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Situation Of Wool And Wool Related Activities in Uttarakhand

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GIRI INSTITUTE OF DEVELOPMENT STUDIES

Sector O, Aliganj Housing Scheme

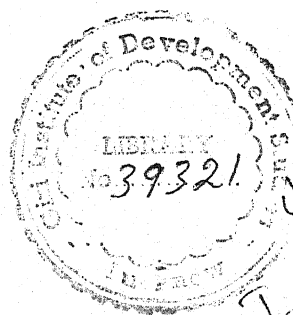
Lucknow 226 020

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PREFACE

The agricultural sector, which is dominant from the point of view of employment and livelihood of the people of Uttarakhand, seems to have attained the upper limit of its development. Keeping in mind the area under agriculture, there is a point beyond which agriculture can not provide gainful employment to the rising labourforce. Thus one has to seek alternative avenues which have the potential of creating employment opportunities within the region. The wool and wool related activities is one such economic sphere which has a wide scope for development within the Uttarakhand region. These activities have already been providing employment opportunities in the region both on a part time as well as full time basis especially in the border districts of Uttarakhand. Even during the British period efforts were made to develop this activity and this task was carried out even after Independence. However, a systematic approach incorporating proper initiatives could not be developed properly in the past. Consequently, the development of the woollen industry has not been satisfactory keeping in view of its potential.

In the light of the above, it was found desirable to examine the existing situation in Uttarakhand with respect to the wool and wool related activities such that an appropriate plan could be designed on the basis of the findings in order to give the necessary boost for the smooth development of this sector. This study was conducted by the Giri Institute of Development Studies, Lucknow on behalf of the Uttarakhand Development Department. We are extremely thankful to the department for providing us with the requisite funds to carry out the study. We also wish to express our gratitude to the various officers and staff of the Gandhi Ashram, Khadi and Village Industries Board, Anusuchit Jan Jati Nigam Limited, Animal Husbandry Department, etc. located at various places in Kumaun and Garhwal from where we could collect the secondary information which has been utilized in this study. Shri D.S. Nagarkoti and Shri H.S. Tewari worked in this project as Research Assistants and assisted in compiling and tabulation of the relevant information. They both worked very hard in this study. Finally we wish to thank Mr Manoharan K. for word processing the drafts and the final report.

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CHAPTER I

INTRODUCTION

The Uttarakhand, comprising of eight hill districts, is among the most underdeveloped regions of Uttar Pradesh despite the fact that it makes a notable contribution in the economic development of the state by way of supplying various natural resources as well as human capital. The economy of the region is based on agriculture which, by itself, has limited potential for development due to several geographical and regional problems. In fact, carrying out agricultural activity in the region is believed to be purely un-economic in nature. Due to non-availability of employment and income generation opportunities in other economic sectors in the region, the labourforce is forced to fall back upon agricultural activities on a part time basis or else migrate outside the region in search of better avenues of employment.

Thus non-availability of employment opportunity to the labourforce has been a serious on-going problem of this region. Even after the initiation of several efforts in the past through development strategies for the creation of

gainful employment opportunities the situation has remained almost the same. So the creation of employment opportunities in accordance with the increasing levels of labourforce in the region seems to be a very difficult task. This is particularly because several kinds of constraints and the basic regional problems are restricting the development prospects of agriculture based economy of the region.

In addition to the efforts undertaken for the development of the agricultural sector, various development programmes have also been introduced in the past plans to exploit and maximise the utilisation of available natural resources in order to bring about a faster and meaningful development of the region. In the various plans, high priority has been accorded to the development of horticulture diversification of agriculture, development of tourism, animal husbandry, minor irrigation, forestry, soil-conservation, development of industries based on locally available raw material, augmentation of various infrastructural facilities such as roads, power, marketing, credit and the fulfilment of various basic needs and amenities of life so as to enhance the process of overall socio-economic development and to create additional opportunities of gainful employment in the region.

However, it is surprising to note that even after implementation of various packages of development under different planned development strategies, the socio-economic

condition of the general masses in the region has remained unchanged. Even, the progress in the development of social and economic infrastructural facilities has been far from satisfactory under the target based development approaches which were associated with the generation of employment opportunities. Accordingly, the region is confronted with a situation of near stagnation in the output of manufacturing sector on one hand and numbers of manufacturing units on the other.

The possible explanation for the unsatisfactory progress in the development of Uttarakhand can more or less be attributed to the basic problem in terms of the identification of suitable packages of development programmes and the identification of proper economic sectors to bring them in the development strategy and programmes which may be suited to actual beneficiaries and local conditions, lack of co-operation among different Government Departments involved in the programme implementation and finally, the lack of monitoring and evaluation practices adopted in the successful implementation of the programmes at different stages.

Keeping in view the bottlenecks in the performance of past development programmes and presently emerging situation of backwardness of Uttarakhand an urgent need is felt regarding the investigation of the potential economic sectors and areas so that a comprehensive development approach may be designed and introduced in the near future. Though the

development potential of the agricultural sector is limited, to a certain extent, even then its development can not be neglected in the present socio-economic situation of Uttarakhand because the economy of Uttarakhand is purely based on agriculture and the sentiments of people, who are engaged in agricultural activities, are deeply attached with this sector. In such a situation, a comprehensive land based development approach may be formulated so that the level of income of the people which are traditionally attached with the agricultural sector for past several generations may be raised to some extent. It has to be kept into consideration that the enhancement of land based development programmes would not be a sufficient condition to create employment opportunities keeping in view the rate with which labourforce is increasing in the region. Therefore, a systematic and planned approach has to be initiated for the development of non-farm economic sectors. Development of non-farm activities could be an important measure for the creation of gainful employment opportunities on a regular and sustained basis.

In Uttarakhand the non-farm activities may be grouped into two broad categories. The first, are those which are directly or indirectly related to agriculture and forestry such as, oil processing, blacksmithy, manufacture and repair of agricultural machinery and equipments, carpentry and the ringal activity. These activities are meeting only local demands and have limited scope for development. The second

group of activities includes those which are based on local as well as non-local raw materials and have no association with the agricultural sector. Prominent among these activities are the spinning and weaving of woollen yarn. The woollen industry has sufficient development potentials and scope in almost all the pockets of Uttarakhand provided a suitable approach of development is conceived and implemented. In fact the woollen activity is accepted by the people of the hills as a secondary source of livelihood in various areas of the region. Spinning and weaving of woollen yarn is mainly concentrated in the bordering areas of Tibet, although in the recent past this activity has been fairly well developed in most of the districts of Uttarakhand. It has also to be kept in mind that the woollen activities are providing employment opportunities to both male and female segments of population. In fact the participation of female labourforce is registered to be significantly higher as compared to their male counterparts particularly in the spinning of woollen yarn.

Objectives of the Study

Keeping into consideration the importance of woollen industry in the light of the fact that it can serve as an instrument for the creation of additional employment

opportunities and to increase the level of income of people in Uttarakhand to a certain extent, it is proposed to carry out a detailed enquiry into the present situation of various woollen activities in the region. Once such a detailed information is available a comprehensive plan could be drafted and introduced for further development of various wool based activities in Uttarakhand. The main objectives of the present study are as follows:

- (a) to examine the technological aspects related to the methodology involved in the processing and analysis in the identification and categorization of wool into different kinds and according to the quality of wool, availability pattern of these facilities in Uttarakhand and the procurement of wool from different sources.
- (b) to assess the volume of wool obtained from different types of sheep and goats and the pattern of supply of different types of wool from outside Uttarakhand.
- (c) to examine the pattern of procurement/purchase, supply and demand structure of different kinds of wool, the type of arrangements involved in its procurement and criteria adopted in the fixation of prices of both domestically produced and imported wool.
- (d) to identify the number of institutions, societies and Government Departments which are engaged in woollen activities, their pattern of procurement of raw materials, structure of production, marketing arrangements and

work arrangements among themselves and with the general public in the region.

- (e) to examine the contribution of different organisations and Government Departments in the promotion of woollen activities by way of providing training facilities and other related wool development programmes in and outside Uttarakhand.
- (f) to assess the problems existing in the procurement of raw material, marketing of woollen products, finance and other issues which are limiting the growth and development of the woollen industry in the region. And finally the study proposes to suggest and recommend suitable measures that can be undertaken in devising a strategy for speedy development of woollen activities in Uttarakhand.

Methodology of the Study

In order to examine the above mentioned objectives several rounds of discussions were held with various organisations engaged in woollen activities, Government Departments and individuals. Secondary information was collected particularly about the purchase of different kinds of wool, sources of procurement, quality of wool purchased

from different sources, production structure, pattern of marketing and the efforts undertaken by different Government and non-Government agencies for the expansion and development of woollen activities in Uttarakhand. A detailed enquiry was also carried out in terms of technical knowledge and methodology involved in the processing, analysis and the classification of wool into different categories from the Animal Husbandry Department. Various production centres of Khadi Board, Shri Gandhi Ashram, Anusuchit and Janjaati Cooperation Limited, Industry Department, private individuals etc. were also personally visited to look at the functioning of their production centres, technique of production adopted and to assess the kinds of problems that are faced by the concerned production centres in their proper functioning.

Uttarakhand has been a main production processing, spinning and weaving centre of wool in Uttar Pradesh for past several years. Even today, the importance of woollen activities is evidenced in its capacity for providing gainful employment and as a source of income in households of lowest and middle income groups. Historically the woollen activities in Uttarakhand were adopted by the Bhotia Community people in the border areas of Uttarakhand. Later the spinning and weaving of woollen yarn became popular among other communities as well in the border areas of district Pithoragarh, Uttarakashi, Chamoli and Dehra Dun. The Bhotia community households were engaged in sheep and goat rearing along with the spinning and weaving of wool. The raw wool

required for spinning and weaving was mainly obtained from their own goats. The additional demand of wool was met through purchase from Tibbet and Nepal. The marketing of woollen products was also carried out by Bhotia Community people within Uttarakhand, Tibbet and Nepal. Thus the Woollen activity in the region has been a traditional household industry for past several generations.

Keeping in view the importance of woollen activity in the economy of Uttarakhand a survey of wool and wool related activities was carried out by the Directorate of Industries during British Government to prepare a comprehensive plan approach for its development. Thereafter, following three development approaches were introduced by the Industry Department in 1938 :

1. Jonsar Babar Wool Plan
2. Garhwal, Najibabad Wool Plan, and
3. Almora, Nainital Wool Plan

Development of Woollen activities in different pockets of Uttarakhand was carried out through the establishment of wool production centres under the initiatives and strategies undertaken on the lines of above three plan approaches. With these initiatives, spinning and weaving of wool not only received a boost but other activities related to wool were also developed in almost all the areas of Uttarakhand. People belonging to other than Bhotia Community also started spinning and weaving of wool on a contract basis. However, the Bhotia community people were engaged in this activity

making it a household enterprise. They were independently engaged in the procurement of wool, production and the trade of woollen products.

After Independence, during 1952-53, all the woollen development plans were brought under a single framework of development which was named the Parvatiya Wool Plan. This Plan approach was implemented under the guidance of Industry Department. Later in 1960, an advisory board was established in the department of industry to look after the wool development programmes but the control over the functioning of woollen activities was vested in the department of industry. However, in 1967, the power regarding the implementation and management control over the wool development programmes, including all Khadi and Cottage Industry related programme was transferred from the industry department to the board. At present, U.P. Khadi Board and Cottage Industry is independently engaged in the development of wool and wool related activities in the region. Besides the Khadi Board, various other societies and organisations are also engaged in woollen activities. Most of these organisations are functioning under the guideline of Khadi Commission. Shri Gandhi Ashram is a prominent and the oldest organisation which has established a number of production and marketing centres of wool in different areas of Uttarakhand. The wool activities in Garhwal division are supervised by the two main production centres located at Dehra Dun and Gochar. Accordingly, in Kumaun division, the main centres of the

Ashram are in Bageshwar, Haldwani and Chanauda. However, the shops for the sale of woollen products are established in almost all the small towns and district headquarters of the region. The marketing of woollen products, produced in Uttarakhand, is also carried out by the Gandhi Ashram outlets located in the plain area of the state. This society has its own plants for processing, carding, finishing of wool in Bageshwar and Chanauda. All the Societies and Organisations, including Gandhi Ashram, Khadi Board, Anusuchit and Janjaati Nigam Limited. Industry Department is engaged in providing job work for spinning and weaving of wool to the spinners and weavers on a piece rate basis.

U.P. Khadi Board is an another organisation which has developed woollen activities in both the Garhwal and Kumaun regions of Uttaranchal quite intensively. The regional offices of the Khadi Board are established in Almora in Kumaun division and Srinagar and Chamba in Garhwal division to manage and supervise the woollen activities in respective divisions. Accordingly a main office of the Parvatiya Wool Yojana is established in Almora for the purpose of providing direction, administrative control and the procurement of required raw materials to other three regional offices of the Khadi Board. In order to facilitate the collection of raw wool from different sources and for supplying the same to different production centres of Khadi Board, a wool bank has also been established in Almora.

The main objective of Khadi Board is efficient production and marketing of woollen products. Besides this the Khadi Board has launched two programmes for the speedy development of woollen activities in Uttarakhand : (a) Production and Training Programme; and (b) Administrative arrangement.

Under these programmes the traditional artisans, spinners and weavers are provided various types of training and know-how, tools and implements needed for carrying the woollen activities. Improved know-how is provided for the production of new products. During the training period financial assistance in the form of scholarship and stipend are also being given to the artisans. And the tools and machines for spinning and weaving are being given to artisan on subsidised rates. Arrangements for the supply of raw materials as per the requirements of the weavers and traditional artisans, arrangements for finishing, milling and washing of finished products in the plants of khadi board are carried out at reasonable rates. With respect to the marketing of woollen products, the marketing arrangements are carried out through the establishment of sales centres and stalls in different areas of Uttarakhand. Even the purchase of woollen articles which are produced by local artisans is directly undertaken by Khadi Board. Khadi Board also makes arrangements for selling the products of artisans outside Uttarakhand.

In order to achieve improvement in the socio-economic conditions of people belonging to the Bhotia Community through the development of woollen activities, offices of Anusuchit Janjaati Development Corporation Limited were established in Garhwal and Kumaun Divisions in 1975. The main objectives of the Corporation are to help the Bhotia households in providing wool for processing, imparting training facilities for the upgradation of designs, size and other know-how technology of spinning and weaving. The Corporation is also involved in making arrangements for the sale of woollen products within and outside Uttarakhand. The Corporation has established show-rooms and sales centres in various places for the sale of woollen articles produced by Bhotia households. The sale of woollen products is also undertaken by the Corporation by itself in the national and state exhibitions and fairs.

Technical Knowledge About the Wool

Initially wool was generally available within Uttarakhand and the shortfall in supply was met from Tibet and Nepal. The wool was obtained from the local goats and similar quality of wool which was available from Tibet and Nepal was known as Tibetan and Belchi wool. The Tibetan and Belchi wool was brought to India by the Bhotias and was supplied by them to other wool processing societies and

organisations. The local wool was also available with Bhotias because only people of this community were engaged in the rearing of goats. However, the supply of Tibbetian and Nepali wool was regular and available in adequate quantity only till 1962. But, after the Indo-Chinese war in 1962 a ban was imposed on the import of Tibbetian and Belchi wool. Again the supply of Tibbetian wool from Bhutan and Belehi wool from Nepal has re-opened since the last two to three years. The Bhotia community people are once again the main suppliers and traders of wool available from these two sources.

In Uttarakhand local wool is available from the Animal Husbandry Department and the local sheeprearsers. Even at present the Bhotia Community people are mainly engaged in the rearing of goats and sheep in tribal areas of Uttarakhand. The wool obtained from goats is similar to that of wool which is imported from Tibbet and Nepal. However, the quality of wool obtained from sheep is relatively more superior than the wool available from goats. But the rearing of sheep in Uttarakhand is an activity of recent origin than the goat rearing activity.

In view of the better quality of wool available from sheep significant efforts have been undertaken to improve the breed of sheep and their numbers in Uttarakhand so as to increase the volume of production of better quality wool. The first initiative with respect to improvement in the breed

of sheep in the region was carried out as far back as 1939 when the ruler of Tehri State imported rams from USA and supplied one ram each to Bhatwari and Purola blocks. These rams left their impact on local sheep. Thereafter, few rams were obtained by the Department of Animal Husbandry and distributed to the progressive Bhotia breeders of Harsil area in Uttarkashi. Sustained and planned efforts in upgrading of local sheep started since 1951. Subsequently, 70 ewes and 20 rams each of Border liescester, Corriedales and Polworth were supplied by FAO as a gift to Central Sheep and Wool Research Station Pashulok, Rishikesh in 1953-54. However, Border Liscester and Corriedales sheep could not be successful and therefore they were not imported in the subsequent years. Later Polworth sheep in the batches of 198, 199 and 108 were imported during 1954-55, 1956-57 and 1973 respectively. During 1973-74, 294 Russian Marino were also imported.

Thus, with a view to put more and more thrust on the efforts for sheep and wool development in Uttarakhand, an Intensive Sheep Development Project was initiated in 1976 with its headquarters at Pauri. Under this project, it was envisaged to carry out extensive cross breeding with exotic and cross breed rams with a view to improve the beed of local sheep and to increase wool production. The intensive Sheep Development Programme has been initiated in all the districts except Nainital which has a negligible sheep population. Under this scheme cross breed rams are supplied to sheep breeders through sheep and wool extension centres. Treatment

and disease control facilities are also provided through a chain of 133 sheep and wool extension centres. These centres also render breeding facilities while cross breed and exotic rams are produced at 14 sheep breeding farms of the Animal Husbandry Department. It may be mentioned that the rams are mainly used for cross breeding Russian Marino rams are used for cross breeding occasionally. At present there are 14 sheep breeding farms established in the districts Chamoli, Uttarkashi, Tehri, Almora, Pithoragarh and Dehradun.

Animal Husbandry Department is also involved in the collection and purchase of wool from local sheep rearing areas. The collection of wool is carried out at different farms. Thereafter the entire quantity of wool which is produced at different farms and purchased from local sheep rearers is brought out at Pashuloke for the purpose of its classification into different categories. The analysis of wool is carried out by the wool experts of Animal Husbandry Department. The classification of wool into different categories in terms of its quality is done through the Benzene test which assesses the extent of medullation in the wool. Benzene is poured in a tray and the wool to be tested is dipped in it. Wool, which is of superior quality, is easily visible inside the Benzene solution while wool of inferior quality is not visible at all. The degree of visibility determines the quality of wool. Thus, the better quality of wool contains lesser medulla. The medulla gets in increasing order according to the elasticity of heat.

The grading of wool into different categories based on its quality is carried out at Pashuloke. The classification of wool into different categories is determined by the level of medulla contained in it. After the classification of wool it is kept in different rooms according to the grades of wool for the disposal to different organisations in Uttarakhand as well as outside Uttarakhand. However, the preference for sale is generally given to the wool production organisations and societies which are situated in Uttarakhand. Even, in Uttarakhand, the top priority is given to Khadi and Village Industry Board in comparison to the other registered wool processing units and those which are associated with the Government.

Availability and Types of Wool

The wool of different types is obtained from three sources in Uttarakhand. The first category of wool is Rembulate which is obtained from sheep. It is available either with the Department of Animal Husbandry or the local sheep rearers. However, Department of Animal Husbandry is the main source for the supply Rembulate wool in Uttarakhand. The wool available with the local sheep rearer is also purchased by the Animal Husbandry Department in bulk. Uttarkashi and Chamoli are the two main purchasing centres of wool. However, the purchase of wool from local sheep rearers

is carried out in all the sheep breeding farms of this department. Tibetan and Belchi wool is another category of wool which is being procured from Bhutan and Nepal respectively. Some quantity of Tibetan type of wool is also available in Uttarakhand which is obtained from goats. It was known that in some areas of Pithoragarh, Uttarkashi, Chamoli and Dehradun Bhotias are engaged in the rearing of goats and sheep. But the supply of wool obtained from these goats is limited and is sufficient enough to meet the requirements of Bhotia households only. The raw wool from goats and sheep can be obtained twice a year in the months of March and October. After shearing of wool from sheep/goats it is put for washing, cleaning and then corded in the carding machine. For the carding of Rembulate wool the facility is available in a private company of Dehradun. However, the facility for the sorting, carding, finishing, milling and washing of Tibetan and Belchi wool is available both with Khadi Board and Gandhi Ashram. The Khadi Board has centres at Srinagar, Chamba and Almora while the Gandhi Ashram has its centres at Bageshwar and Chanaunda. The facility of carding of wool from these two organisations can be availed by other wool producing societies and individuals as well at the rate of Rs.16 per kg. of wool carded.

Wool can be obtained from the sheep after they attain the age of one and a half years. The optimum age of sheep in terms of providing wool is about 5 years. The volume of wool production starts increasing only after two to three shearing

of wool. However, the quantum of wool production starts decreasing once the sheep are 5 years old. The quantity of wool produced and its quality is determined by the geographical location of the area and the attitude of the particular location. Better quality of wool in higher quantities can be obtained in the areas located at high altitudes. The areas with temperature level of F3 is considered to be the most suitable from the view point of production as well as the quality of wool. The wool production at peak stages is estimated to be 6 to 6.5 kgs. from male Rembulates in a year. However, average production per sheep ranges between 3.5 kgs. to 4 kgs. in a year.

As stated earlier, the procurement of Tibbetian and Belchi wool is carried out from Tibbet. Traders from India are involved in the purchase of Tibbetian and Belchi wool. Every year during September and October they visit Taklakote mandi in Tibbet and procure wool according to their personal purchasing capacity. Sometimes during October and November the entire quantity of the wool purchased is brought to Dharchulla for sale to different Indian Societies, Organisations and individuals who are engaged in woollen activities. Bhotia community is mostly involved in the procurement and sale of Tibbetian and Belchi wool. The wool is brought to India after paying the prescribed custom duty to Government of India. However, it is also reported that some traders who are engaged in goat rearing as well as in trading of wool generally bring unsheared goats to India from

Tibbet and after shearing wool in India they again sell the goats back to Tibbetian traders. In this way these traders are avoiding the customs duty.

The third type of wool is known as Marino/Australian wool which is being imported from Russia and Australia. However, during recent past similar type of wool is also being imported from New Zealand. Quality-wise, Marino/Australian wool is far superior than the remaining types of wool available from different sources in India. All the institutions and organisations engaged in woollen activities are purchasing Marino/Australian and New Zealand's wool from Himachal Pradesh Woollen Federation, Rajasthan Wool Federation and the Wool traders of Punjab. The Woolmen India Limited, Thane, Bombay, is the main authorised buyer of Marino/Australian wool from different countries. The U.P. Khadi and Village Industry Board is directly buying required quantity of Marino/Australian wool from Woolmen India Limited. However, remaining institutions and individuals are obtaining wool mostly from other private individuals and the wool federations of different states.

Fixation of the Prices

The prices of Rembulate wool are fixed by the District Magistrate of the concerned districts and the committee appointed by the Animal Husbandry Department. Discussions

are generally held before the fixation of prices among the representatives of wool producers, suppliers, district level Animal Husbandry Department Officials and the District Magistrate of the particular district. Thereafter the District Magistrate presents the matter and final views discussed in the district level meeting before the committee for the final fixation of prices. The rates fixed by the committee are final and are applicable in all the wool purchasing centres of the Animal Husbandry Department.

In regard to the fixation of prices for the Tibbetian and Belchi wool a committee comprising of District Magistrate and General Manager, District Industry Centre (DIC), Pithoragarh and a representative of Khadi and Village Industry Board hold a meeting before the arrival of wool from Tibbet at Dharchulla. The prices of wool are fixed in a meeting and then the prices are announced to the wool traders. The traders are under obligation to sell wool according to the prices fixed by this committee in that particular year.

CHAPTER II

PRODUCTION AND SUPPLY OF WOOL

As has already been indicated in the preceding chapter, the main sources of supply of local wool to the various organisations and individuals engaged in manufacturing of woollen products are the Animal Husbandry Department of the State Government or the private sheep rearer. It had further been pointed out that the State Government has established fourteen sheep farms in different locations in Uttarakhand and that these farms are actively involved in improving the breed of sheep through scientific cross breeding, production of wool and procurement of wool from the local sheep rearers. The main office, located at Rishikesh, besides carrying out experiments in sheep breeding, is engaged in the analysis and classification of wool; to investigate and evolve effective measures for controlling disease among sheep; fodder development; and, the management and control over the other farms whose activities are coordinated by this office.

Production of Local Wool

Currently the sheep population of Uttarakhand is close to four lakhs. However, as per the 1988 Animal Husbandry

Census Report, the total sheep population was reported to be 3.55 lakhs whereas the same figure stood at 4.08 lakhs for the year 1982. According to the estimates of Animal Husbandry Department the quantum of wool available from the sheep reared locally is around 3.5 lakh Kgs. However, a major share of the wool so produced is utilized by the sheep rearers themselves and only about 1 lakh kg. of wool is supplied to other agencies or individuals. During the year 1993-94 the Animal Husbandry Department purchased 13,352 kgs. of wool and obtained a further 13,641 kgs. of wool which was produced on its own farms. Over the years the production of wool in Uttarakhand has been consistently increasing. Going by the estimates of the Animal Husbandry Department the wool production which stood at 418.7 thousand kgs. in 1990-91, went upto 447.38 thousand kgs. in 1991-92 and then on to 459.76 thousand kgs. by 1992-93. It is observed that wool production is much higher in Garhwal Division as compared to Kumaun Division. In fact, Garhwal Division produces over times higher quantity of wool as compared to the Kumaun Division - 361.84 thousand kgs. in 1992-93 as compared to 97.92 thousand kgs. during the same year in Garhwal and Kumaun Division respectively. However, what is encouraging is that even in Kumaun the trend is an increasing one. Looking at the wool production in the state as a whole the production registered an increase from 1725.7 thousand kgs. in 1990-91 to 1854.29 thousand kgs. in 1992-93 which means

that production went up around 7 per cent. As against this the total wool production in the country as a whole increased from 41.2 million kgs. in 1990-91 to 43.3 million kgs. in 1992-93.

Table 1 : Production of Wool in Uttarakhand and U.P.

(in '000 Kgs.)

Region/State	1990-91	1991-92	1992-93
Kumaun Division	86.9	93.26	97.92
Garhwal Division	331.8	354.12	361.84
Uttarakhand	418.7	447.38	459.76
Uttar Pradesh	1725.7	1792.44	1854.29

Source : Department of Animal Husbandry, Pauri Garhwal, U.P.

Wool can be obtained twice in a year. The shearing of local wool in the high altitude areas like Joshimath, Harsil, Karmi, etc. takes place during September and October. After six months of first shearing the second shearing of wool is undertaken during March and April. The wool sheared during the period September and October is mostly utilized in Uttarakhand. However, the wool sheared during March and April, particularly the wool obtained in Valley areas of Uttarakhand like Rishikesh, is generally purchased by the large mills located outside Uttarakhand. It was known that

the kind of wool available in plain areas outside Uttarakhand is of short shape and is not suitable for spinning in new model charkhas. So the mills situated in the other parts of state mainly prefer to buy wool from the Valley areas of Uttarakhand.

As was stated earlier, the per sheep productivity of wool is determined by the location and the altitude of the area. In high altitude areas of Uttarakhand the production of wool per sheep is found to be significantly higher than the low altitude areas of the plains. Even within Uttarakhand, the quantity of wool obtained per sheep in Rishikesh is noted to be less as compared to the wool obtained in areas like Harsil and Karmi. Due to this fact we find that the average per sheep production in Uttarakhand is 1.179 kgs. as against 0.863 kg. in state as a whole. Also the productivity of wool per sheep is recorded to be significantly higher in Garhwal Division (1.181 kgs.) as compared to Kumaun Division. However, the wool productivity per sheep has been increasing both in Garhwal as well as Kumaun Division over the years. In fact, the productivity of wool at state level has also increased from 0.835 kg. in 1990-91 to 0.854 in 1991-92 and 0.863 kgs. in 1992-93. However, the volume of increase in the per sheep production of comparably much higher in Kumaun Division than in the Garhwal Division during 1990-91 and 1992-93 (Table 2). However, the average quantity of wool produced per sheep in Kumaun Division is lagging behind to the Garhwal Division.

Table 2 : Per Sheep Average Production of Wool

(in '000 Kgs.)

Region/State	1990-91	1991-92	1992-93
Kumaun Division	1.107	1.152	1.170
Garhwal Division	1.140	1.178	1.181
Uttarakhand	1.330	1.172	1.179
Uttar Pradesh	0.835	0.854	0.863

Source : Department of Animal Husbandry, Pauri Garhwal, U.P.

The wool obtained from sheep can be utilized for spinning after it has been properly washed, cleaned and combed. The facility of washing, combing, finishing, etc. in Uttarakhand is available with the Doon Valley Combers Limited in Dehradun. In fact, most wool producing organisations and individuals of northern India are combing wool with the assistance of this company. Otherwise this type of facility can be availed in Ludhiana, Panipat and Amritsar. The current prescribed rates of cording, finishing and combing together for different types of Indian wool excluding cross breed and rembulate wool are between Rs.22.50 to Rs.23.50 per kg. However, for the combing of cross breed, rembulate and imported wool the charges are Rs.28 per kg. In a situation where the combing of wool is done in small quantity, additional charges are to be paid between Rs.2.50 to Rs.4.00 for per kg. wool. But the company does not accept less than

1000 kgs. wool at a time from any individual wool unit for combing wool in this plant. Therefore, different small wool based units and institutions bring wool collectively and give it in bulk for combing. Even, all the production centres of Shri Gandhi Ashram and Khadi and Village Industry Board first collect the required quantity of wool together at one production centre then the entire quantum of wool is brought to Dehradun for combing. It was also known that the greasy, scoured, wool with heavy dust/skin and other substandard wool is not accepted directly by the company for combing. These categories of wool is accepted only after the analysis and examination of the sample of wool. The examination and analysis charges for such wool are separately paid and are negotiable and range between Rs.1 to Rs.5 for per kg. of wool.

Prices of Wool

As highlighted earlier, the prices of cross breed and rembulate wool are fixed by a committee comprising of District Magistrate and the members of Animal Husbandry Department. The prices are fixed after the classification of different types of wool into different categories and grades. During 1993-94, the prices of rembulate wool were fixed between Rs.37.50 to Rs.53.00 per kg. depending on the quality

of a particular wool. However, the prices of lowest category of wool were Rs.27.00 for one kg. Accordingly, the prices of wool obtained from cross breed sheep were fixed between Rs.27.50 to Rs.48.90. The average price per kg. of wool thus estimated to be around Rs.40.00 and Rs.42.00 for the years 1992-93 and 1993-94 respectively. The prices fixed for beady and skirting angura wool were Rs.700 and Rs.600 respectively. It has to be kept in mind that in the fixation of the market prices of local wool the combing and other charges paid for processing of the different categories of wool have to be included.

Purchase of Local Wool

Purchase of local wool as rembulate and mixed breed wool by different institutions is carried out from Animal Husbandry Department and local sheep rearers. During 1993-94, the purchase of rembulate and mixed breed wool was estimated to be 98682 kgs. which was at a slightly lower level as compared to the wool purchased during 1992-93 (99815 kgs.). However, the corresponding data for the year 1991-92 could not be available from the woollen institutions except in the case of Khadi and Village Industry Board and Shri Gandhi Ashram. In fact, the data regarding the purchase of local wool for reference period was not available with the Anusuchit Jan Jati Corporation Limited. Our analysis reveals

that the pattern of purchasing local wool exhibits a declining trend over the years. This is due to the fact that the volume of wool purchased by Shri Gandhi Ashram has declined from 91137 kgs. in 1992-93 to 81900 kgs. in 1993-94. Enquiring about the decline in the quantity of wool purchased by Shri Gandhi Ashram during reference period it was informed that the tradition of spinning of wool through Takli and Bageshwari Charka has decreased considerably due to the introduction of New Model Charka during recent years. The spinning of local wool can be better carried out by Bageshwari Charka and Takli only while it becomes difficult to spin local wool through new model charka. The better quality imported wool such as Australian/Marino which contains long spirts as compared to local wool, is spun more easily through new model charka. Therefore, the increasing demand of Australian/Marino wool has led to a corresponding decline in the demand of local wool. However, instructions are given to Khadi and Village Industry Board from their Head Office asking them to utilize local wool as far as possible. The imported Australian/Marino wool is supplied to them in limited quantity. Shri Gandhi Ashram is not facing such restrictions in the procurement of imported wool. So the purchase of Australian/Marino wool carried out by Shri Gandhi Ashram has been consistently increasing while the purchase of local wool has been subsequently decreasing over the years. The quantity of local wool purchased by the Khadi and Village Industry Board has increased from 5496 kgs. in 1992-93 to 11331 kgs. in 1993-94. Accordingly, the purchase of wool

carried out by Anusuchit Janjati Corporation Limited has gone up from 3181 kgs. in 1992-93 to 5541 kgs. during 1993-94. In terms of the value of wool purchased by various woollen institutions together is estimated to be Rs.38.43 lakhs in 1993-94 and Rs.41.56 lakhs in 1992-93.

Table 3 : Purchase of Local (Rembulate and Mixed Breed) Wool

Institu- tions	1991-92		1992-93		1993-94	
	Quantity (Kgs.)	Value (Rs.)	Quantity (Kgs.)	Value (Rs.)	Quantity (Kgs.)	Value (Rs.)
Khadi Board	2341.00	84290.00	5496.395	203360.00	11331.00	499159.00
Shri Gandhi Ashram	N.A.	N.A.	91137.400	3825006.00	81910.00	3112580.00
Anusuchit Janjati Corpn. Ltd.	N.A.	N.A.	3181.000	127240.00	5441.00	231242.00
Other	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
All Insti- tutions	2341.00	84290.00	99814.795	4155606.00	98682.00	3842981.00

Supply of Tibbetian and Belchi Wool

The Tibbetian and Belchi wool in Uttarakhand is available from Tibet and Nepal in the form of raw wool. Some quantity of Tibbetian type of wool is also obtained from the local goats which are reared by people belonging to the

Bhotia community in high altitude areas of Uttarakhand. But the locally available wool is not even sufficient to meet the requirements of these goat rearers. The supply of Tibetan wool from Tibet was banned since the Indo-China disputes in 1962. However, the ban imposed on the supply of wool in 1962 has been lifted and the supply of wool has been restored again since last two to three years.

During 1991-92, 50.99 qtls. Tibetan wool was imported from Tibet under different arrangements. However, during 1992-93 the quantum of wool purchased from Tibet increased to 443 qtls. but, the respective figures declined to 270.75 qtls in 1993-94. It was stated by various organisations, particularly Khadi and Village Industry Board and Shri Gandhi Ashram, that the general demand for woollen products made of Tibetan wool has decreased considerably in Uttarakhand over the time. The demand of people has shifted towards the purchase of soft wool products and which are manufactured in large mills. This decreased demand for Tibetan made woollen products has adversely affected the pattern of import of Tibetan wool over the years.

After the raw Tibetan wool is procured, it is put for washing, cording, finishing and milling and then used for spinning. The facility of cording, etc. is available both with Shri Gandhi Ashram in Chanauda and Bageshwar and Khadi and Village Industry Board at Almora, Sri Nagar and Chamba. The facility of cording etc. available with these two

institutions can also be utilized by other private individuals. The cording charges are fixed at Rs.16 per kg. of wool.

The prices fixed for the purchase of Tibetan wool were Rs.56 per kg. during the year 1992-93. However, as a result of the decrease in demand for its variety of wool, its prices went down marginally to Rs.55 per kg. in 1993-94. It was also found that wool such as cross breed wool and its skirts, rembulate breed wool and angora wool is also being imported from Tibet along with the traditional variety of Tibetan wool which has always been purchased by our craftsmen. During 1994, the prices fixed for rembulate and cross breed wool were Rs.42 and 34 per kg. respectively. However, skirts wool, which is obtained from rembulate and cross breed goats, is considered inferior in quality and was priced between Rs.17.50 to Rs.20.00 per kg. during the same year. Angora wool was most expensive and fetched a price of Rs.600 per kg.

As far as the Angora and Palbasm wool is concerned, these both varieties of wool is purchased from Tibet as well as from the local goat rearers. It is also reported that the Anusuchit Janjati Corporation Limited is also involved in the development of Angora wool in Uttarakhand. According to the information available, Angora wool has been utilized only by Anusuchit Janjati Corporation Limited and Khadi and Village Industry Board for the production of its goods so far. During 1991, Khadi Board had purchased only 5 kgs. Angora wool. However, the purchase of Angora wool carried out by

Anusuchit Janjati Corporation Limited accounted for 61.785 kgs. in 1991, which has increased to 145 kgs. during 1992 but it has decreased to 50.200 kgs. in 1993. It was reported that the Angora wool was available at the rate of Rs.500 to Rs.530 during 1993-94 in Uttarakhand.

Purchase of Tibbetian and Belchi Wool

The data regarding the purchase of Tibbetian and Belchi wool during different periods was collected from the offices of the District Magistrate and District Industry Centre, Pithoragarh. However, details regarding the volume of wool purchased by various woollen institutions was collected by making personal visits to the concerned institutions. It has to be mentioned here that the quantity of Tibbetian and Belchi wool which is brought by individuals through illegal means and whose records are not maintained by any Government Department is not included in our analysis. On the whole, various institutions which are engaged in woollen activities have purchased 66349 kgs. Tibbetian and Belchi wool during the year 1993-94. However, during previous year in 1992-93 the quantum of wool purchased was nearly one-fourth of the wool which was purchased during 1993-94 (19869 kgs.). This indicates that the demand of Tibbetian and Belchi wool in India, and particular in Uttarkhand, is consistantly

increasing over the years. Despite the fact that the general elasticity of demand for the purchase of woollen products which are made of Tibbetian and Belchi wool has been reported to be declining considerably. Various woollen institutions have indicated the fact that due to the availability of mill made superior quality woollen products at reasonable prices in the local market, people are mainly going in for the purchase of mill made products.

The analysis related to the pattern of procurement of Tibbetian and Belchi wool during different periods reveals that the quantum of wool purchased by Khadi and Village Industry Board during the reference periods was significantly much higher than in the remaining institutions. Khadi Board purchased 8846 kgs. wool during 1992-93 and this quantity increased substantially to 4420 kgs. during 1993-94. However, the respective figures for Gandhi Ashram were 7670 kgs. during 1992-93 and 18869 kgs. during 1993-94. Accordingly, the quantum of wool purchased by Anusuchit Janjati Corporation Limited stood at 1273 kgs. in 1992-93 and increased to 3060 kgs. during 1993-94. The data regarding the purchase of Tibbetian and Belchi wool which is carried out by Industry Department could not be obtained for the years 1991-92 and 1993-94. However, during 1992-93 this department had purchased 2080 kgs. wool. In value terms, all the woollen Institutions together spent Rs.31.16 lakhs in the purchase of Tibbetian and Belchi wool during 1993-94 as against Rs.8.96 lakhs spent during 1992-93.

The Khadi and Village Industry Board has established a wool Bank in Almora under the provision of Parvatiya Wool Yojana. In the first year of the establishment of wool Bank in 1985-86 the Uttarakhand Development Department sanctioned Rs.6.98 lakhs for the purchase of Tibbetian and Belchi Wool. Thereafter, financial assistance is regularly being provided to the Wool Bank by the Uttarakhand Development Department. In addition to the grants provided for the purchase of wool the Bank also received Rs.7.75 lakh for the establishment of wool store at Tehri. During 1991-92 and 1992-93 the financial assistance provided to wool Bank stood at for Rs.28 lakhs and Rs.50 lakhs respectively. However, the condition laid down on the given amount of financial assistance during 1992-93 was that the wool Bank will have to return the entire money within three years. With interest payable at the rate of 18.5 per cent per annum. However, during 1993-94, the wool Bank has been provided Rs.28.00 lakhs interest free financial assistance for the purchase of different types of wool. A Committee headed by the District Magistrate was formulated during 1993-94 for the purchase of wool. The committee has spent Rs.10.40 lakhs on the purchase of Belchi wool till now. In addition to the purchase of Belchi wool, the Bank has utilized remaining amount of financial assistance, received from Uttarakhand Development Department, on the purchase of Australian/Marino Wool, rembulate and mixed breed wool.

In order to make the distribution of wool easier to different institutions and the production centres of Khadi Board, two more branches of Wool Bank have also been established recently in Chamba and Gopeshwar and the provision for the establishment of a Bank Office of wool bank in Srinagar is under consideration. The main objectives behind the establishment of Wool Bank are to make proper arrangements for the procurement of different types of wool and to distribute the procured wool among the individuals and institutions which are engaged in woollen activities within Uttarakhand. However, the prime objective of the wool bank is to make proper estimates regarding the quantum of different types of wool which are expected to be required during different periods of time by the various production centres of the Khadi and Village Industry Board located in Uttarakhand. These estimates are to be forwarded to the Head Office of the Board at Lucknow for favour of its final approval. Thereafter, as per the approval of its Head Office different types of wool from different sources, as indicated by Head Office, is purchased by the Wool Bank for the purpose of meeting the demand of different production centres of the Board in Uttarakhand. The remaining quantity of wool is distributed among other institutions and individuals. During the period 1993-94, the Wool Bank had received Rs.1039594 for the purchase of Tibbetian and Belchi wool under this scheme. The Bank had purchased 12900 kgs. Belchi wool. Out of this, 195.500 kgs. was distributed among the individuals and 1802 kgs to woollen societies while remaining wool was distributed

among the different production centres of the Khadi and Village Industry Board.

Table 4 : Purchase of Tibbetian and Belchi Wool

Institu- tions	1991-92		1992-93		1993-94	
	Quantity (Kgs.)	Value (Rs.)	Quantity (Kgs.)	Value (Rs.)	Quantity (Kgs.)	Value (Rs.)
Khadi Board	90.000	3675.00	8846.000	398119.00	44420.500	2089615.00
Shri Gandhi Ashram	N.A.	N.A.	7669.800	311839.00	18868.900	858298.40
Anusuchit Janjati Corpn. Ltd.	855.300	34488.50	1273.700	70053.50	3060.000	168300.00
Other	N.A.	N.A.	2080.000	115500.00	N.A.	N.A.
All Insti- tutions	945.300	38163.50	19869.500	895511.50	66349.400	3116213.40

According to the information obtained from different institutions engaged in the woollen activities the total quantity of Tibbetian and Belchi wool purchased during 1993-94 was 66349.4 kgs. The purchase of these types of wool was mainly carried out from Tibet through the wool traders while similar type of wool was also purchased from the local sheep/goat rearers of the boardering areas of Uttarakhand. It should be noted that the volume of Tibbetian and Belchi wool

which was purchased during 1993-94 was more than double the volume of wool purchased during 1992-93 (19689 kgs.). The Khadi and Village Industry Board purchased highest quantity of wool among the various woollen institutions. The Khadi Board procured wool both for the production of woollen goods at its production centres as well as for the distribution to other individuals and institutions engaged in woollen activities. The contribution of Khadi and Village Industry Board in the purchase of total quantity of Tibetan and Belchi wool is noted to be around 66 per cent. However, only 28 per cent and 6 per cent wool was purchased by Shri Gandhi Ashram and Anusuchit Janjati Corporation Limited respectively. But, during 1992-93, the share of Khadi and Village Industry Board in the total quantity of wool purchased by various institutions was registered to be 44 per cent as against 39 per cent and 6 per cent wool was purchased by Shri Gandhi Ashram and Anusuchit Janjati Corporation Limited respectively. On the whole the pattern of purchasing the Tibetan and Belchi wool is consistently increasing in the case of all institutions which are engaged in woollen activities in Uttarakhand.

Supply of Other Wool

Besides the wool which has already been mentioned earlier, wool is made available from some other sources as

well. The most important varieties are the Australian/Marino wool imported from Australia and that imported from New Zealand. Both these varieties are far more superior in quality as compared to the wool which is produced in Uttarakhand as well as that which is imported from Nepal and Tibet. Even among these two varieties themselves the Australian wool is of a more superior quality than the New Zealand wool. These two varieties of wool are procured from Panipat, Amritsar, Himachal Pradesh, Rajasthan and Thane (Bombay). However, a major proportion of the wool is brought from Panipat and Amritsar by the Shri Gandhi Ashram as well as those individuals who are engaged in the manufacture of woollen products. But the Khadi and Village Industry Board is purchasing these categories of wool from Thane. According to the information available regarding the procurement of imported wool in Uttarakhand, the Khadi and Village Industry Board, Shri Gandhi Ashram Anusuchit Janjati Corporation Limited and District Industry Department (DIC) together have utilized 38370.290 kgs. Australian/Marino wool and 2328 kgs. New Zealand's wool during 1993-94. The procurement of Australian wool carried out during 1991-92 was 21293.070 kgs. which has increased to 42758.525 kgs. during 1992-93. A major quantity of Australian/Marino wool was obtained by Khadi and Village Industry Board and Shri Gandhi Ashram during 1992-93 and 1993-94 while during 1991-92 the Anusuchit Janjati Corporation Ltd. alone purchased 3327.07 kgs. Australian/Marino wool. As far as the supply of wool from

Table 5 : Procurement of Australian/Marino and New Zealand's Wool

(Quantity in Kgs.)

Institu- tions	Australian/Marino			New Zealand Wool		
	1991-92	1992-93	1993-94	1991-92	1992-93	1993-94
Khadi Board	865.000	16438.000	12401.000	-	-	-
Shri Gandhi Ashram	17101.000	23646.500	19954.500	-	-	1132.000
Anusuchit Janjati Corpn. Ltd.	3327.070	2674.025	6014.770	2238.000	6.000	1197.000
Other	N.A.	N.A.	N.A.	N.A.	370.000	N.A.
All Insti- tutions	21293.070	42758.525	38370.270	2238.000	376.000	2329.000

New Zealand is concerned it was mainly purchased by Shri Gandhi Ashram and Anusuchit Janjati Corporation Limited during 1993-94. The quantity of New Zealand's wool procured by Shri Gandhi Ashram and Anusuchit Janjati Corporation Limited is indicated to be 1132.000 kgs. and 1197.000 kgs. respectively. On the whole the demand of imported wool, particularly the Australian wool, is increasing quite significantly in Uttarakhand. This is particularly due to the fact that the Australian wool is recognised to be more suitable in spinning through the presently developed new model charka for spinning of wool. It is indicated that the import of Australian wool has doubled during 1992-93 as

compared to 1991-92 while a marginal decrease of about 10 per cent has been observed during 1993-94 as compared to 1992-93. The observed decrease in the quantum of imported wool could be basically as a result of the fact that data in this connection could not be obtained from other institutions, particularly DIC which had purchased 370 kgs. imported wool during 1992-93.

It has to be mentioned here that the data regarding the procurement of different types of wool could not be available from the private agencies and individuals which are involved in the woollen activities in Uttarakhand. Because the woollen activities are functioning on a large scale at the household level making them traditional household activities, it is rather difficult to collect accurate data from different households. The analysis on the purchase of different types of wool we are presenting here is mainly collected from the production centres and offices of Khadi and Village Industry Board, Shri Gandhi Ashram, Anusuchit Janjati Corporation Limited and District Industry Centre (DIC), Pithoragarh. However, the complete information and data is provided in regard to the supply of local wool from Animal Husbandry Department, and the quantum of wool procured from Tibet and Nepal during last three years, i.e. 1991-92, 1992-93 and 1993-94.

A further probe into the pattern of the purchase of Australian and New Zealand wool in value terms reveals that

different institutions engaged in the woollen activities spent a total amount of Rs.89.68 lakhs in the procurement of both the types of wool in 1993-94. However, during 1991-92, the value of wool purchased accounted for around Rs.35 lakhs and this amount increased to Rs.97.50 lakhs during 1992-93. Shri Gandhi Ashram not has the major share among various institutions in the total value of Australian/Marino and New Zealand's wool during the reference years. In fact, the quantum of Australian and New Zealand's wool purchased by Shri Gandhi Ashram is consistently increasing over the year as indicated by the fact that the value of these varieties of wool purchased by Shri Gandhi Ashram has increased from Rs.32.66 lakhs in 1991-92 to Rs.50.36 lakhs in 1992-93 and Rs.57.10 lakhs in 1993-94.

Table 6 : Purchase of Australian/Marino and New Zealand's Wool

(Value in Rs.)

Institutions	Value of Wool Purchased		
	1991-92	1992-93	1993-94
Khadi Board	164350.00	3604082.12	2507278.50
Shri Gandhi Ashram	3265574.50	5036083.58	5710369.50
Anusuchit Janjati Corpn. Limited	1074279.42	1029799.60	1750075.80
Other	50000.00	79640.00	N.A.
All Institutions	3479924.50	9749605.30	8967723.80

As far as the prevailing system with respect to the supply of Australian/Marino and New Zealand's wool is concerned, it was found that the institutions engaged in the production of woollen products are obtaining wool required by them very unsystematically from different wool trading agencies located outside Uttarakhand. None of the institutions have any regular arrangement with any wool trading agency for procurement of wool. However, the Khadi and Village Industry Board is purchasing required quantity of wool from Woolmen India Limited, Thane (Bombay) through Khadi and Village Industry Commission. It was indicated by the Khadi and Village Industry Board that all the centres of Khadi Board located in Uttarakhand are first required to estimate the expected demand of wool required for the production of woollen products by them during the year. Thereafter, the proposal for the procurement of a particular quantum of wool is forwarded to the Khadi and Village Industry Department, Lucknow for its final sanction. Accordingly, the Khadi Board asks the Khadi and Village Industry Commission to make suitable arrangement with the Woolmen India Limited for the supply of required quantity of Australian and New Zealand's wool. The remaining woollen institutions are obtaining Australian/Marino and New Zealand's wool mainly from the wool traders of Amritsar, Ludhiana, Panipat and Karnal in Punjab, Jammu and Kashmir and Himachal Pradesh. The analysis based on the data obtained

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Table 7 : Supply of Australian/Marino and New Zealand's Wool from Different Origins During 1993-94

(Quantity in Kgs.)

Institutions	Volume of Wool Supplied by Sources				
	Thane	Jammu & Kashmir	Punjab	Himachal Pradesh	All Sources
Khadi Board	12401.000	-	-	-	12401.000
Shri Gandhi Ashram	728.000	509.000	15749.000	4100.500	21086.500
Anusuchit Jan-jati Corpn. Limited	-	4109.000	1500.000	1602.770	7211.770
Others	-	-	-	-	-
All Institutions	13129.000	4618.000	17249.000	5703.270	40699.270

from various institutions regarding the purchase of wool from different sources revealed that a major quantity of wool which is required in Uttarakhand is obtained from the wool traders of Punjab (17249 kgs.). The Woolmen India Limited (Thane) is the second most important supplier of Wool (13129 kgs.) in Uttarakhand, especially to Khadi and Village Industry Board which alone obtained 12401 kgs. wool followed by 728 kgs. wool by Shri Gandhi Ashram. The Gandhi Ashram has purchased highest quantity of wool (15749 kgs.) from wool traders of Punjab followed by 4100 kgs. from Himachal Pradesh

Wool Federation and only 509 kgs. from Jammu and Kashmir Wool Federation during 1993-94. However, the Anusuchit Janjati Corporation Limited has met its requirement of wool mainly from Jammu and Kashmir (4109 kgs.). Besides this the quantity of wool obtained from Himachal Pradesh and Punjab is recorded to be 1603 kgs. and 1500 kgs. respectively. The data in this regard could not be available from other institutions like Industry Department (DIC) etc. for the year 1993-94.

CHAPTER III

PRODUCTION AND MARKETING

In the previous chapter we mainly dealt with the supply and demand pattern of different types of wool in Uttarakhand. Analysis was also undertaken in relation to the pattern, process and arrangements prevailing in the purchase of local as well as imported wool. In the present chapter it is proposed to carry out our analysis in connection with the structure of the production of woollen goods and existing marketing arrangements regarding the sale of different products. However, before dealing with the pattern of production and sale of woollen products it would be desirable to highlight the technical aspects related to the technique involved in the production of woollen products.

Production Technique

The raw wool which is obtained from sheep is firstly washed, corded and combed. Thereafter wool is spun into thread. The spinning of wool is performed by Takli, Bageshwary Charkha and New Model Charkha. The Takli is the age old traditional equipment and looks just like a stick of

wood which is made by spinners themselves. Use of Takli as a means of spinning of wool is a traditional method. This production technique has considerably decreased after the introduction of Bageshwary Charkha, introduced sometime between 1935-38, since production efficiency in the spinning of wool by Bageshwary Charkha is much higher as compared to Takli. However, at present, the New Model Charkha, which has four spindles, has been introduced for the spinning of wool. As a result of the introduction of New Model Charkha the use of Bageshwary charkha has also declined considerably over the years. The production capacity of New Model Charkha is stated to be four to five times higher than the Bageshwary Charkha. But the spinning of Tibbetian and local wool can be performed more easily on the Bageshwary Charkha. Therefore, the use of Bageshwary Charkha has been limited only as far as the spinning of local and Tibbetian corded wool is concerned. It is due to the fact that the local and Tibbetian corded wool contains short spirals so relatively better counts of thread can be produced through Bageshwary Charkha and Takli only. No doubt, the New Model Charkha is also being used as a mode of spinning both for the local as well as Tibbetian corded wool by most of the spinners. But the thread produced through New Model Charkha is recognised to be relatively of lower counts than the thread produced through Takli and Bageshwary Charkha. The Australian/Marino tops is reported to have long spirals and is significantly more suitable to be spun through New Model Charkha in better numbers of counts.

After the spinning of different categories of wool it is rolled in the hanger. Thereafter the rolls of thread are put out from the hanger and the counts are fixed accordingly. The measurement of the thread into different counts is carried out manually. The general criteria involved in the fixation of the counts of different types of threads is firstly, it is noted that how many times the whole quantity of thread is rolled in the hanger and then the weight of total thread rolled in the hanger is carried out. Thus the thread is finally classified into different counts. The diameter of the hanger happens to be around 2.5 feet.

The thread is utilized in the weaving of different types of woollen products. It should be noted that at a time only similar counts of thread can be used in the weaving of a particular woollen product. Because, ultimately the quality of particular woollen product with similar type of wool used in its weaving, is determined by the counts of thread used in the weaving and the total weight of the particular products. Though several other factors such as the type and category of thread used in the production, finishing of the product and several other variable costs involved in the production of different woollen products are the additional factors for the determination of prices of different products.

For the purpose of the weaving of different woollen articles the thread of similar counts is firstly rolled into small instruments through Rahat and then it is simultaneously

rolled in the Drum. The diameter of the drum which is made of wood is fixed at 2 metres. After rolling the entire quantity of thread or the quantity of thread that is expected to be required for the manufacture of a particular product, on the drum which is again removed from the drum and rolled on to a wooden roller of a particular size. The roller together with thread is to be fixed with the Ranch. The Ranch is machine used for the weaving of woollen products. However, some other traditional machines such as Pithi Chan, etc. are also used in the weaving of woollen products, particularly the products known as Chutka, Seat, etc. in the bordering areas of Uttarakhand. Finally the woollen products are manufactured through undergoing these above processes. All the machineries and equipments which are used in weaving and the manufacturing of different woollen products are available locally in Uttarakhand. The machines and equipments are manufactured by local carpenters or the artisan households themselves. However, only an instrument known as kangi (comb) is available outside Uttarakhand. Presently the comb is being purchased from Panipat and Ludhiana by different woollen institutions.

The market price of comb is reported to be Rs.1200. However, the cost of main weaving machine Ranch varied between Rs.1200 to Rs.1500. The prices of drum is indicated to be between Rs.1500 to Rs.2000. The total cost of all the weaving machines and other small equipments used in the production of woollen products together is estimated to be

between Rs.4500 to Rs.5500. The Bageshwary Charkha used in the spinning of wool is available from Kausani and Bargaon in Uttarakhand. The market price of Bageshwari Charkha, including all other instruments attached with it is reported to be around Rs.660. However, the recently developed New Model Charkha can be obtained from Ahmedabad and Veenus Textile Equipments Limited, New Delhi. The cost of New Model Charkha having four spindles costs Rs.5000 while the cost of NMC with two spindles works out to be Rs.3000. However, at present the New Model Charkhas are mainly being purchased through Block Development Office for the purpose of distribution among the rural artisans on the basis of loan cum subsidy under the Integrated Rural Development Programmes.

Rates of Spinning and Weaving

As far as the prescribed rates for the spinning and weaving of wool is concerned various institutions and societies have their own criteria for the measurement and identification of thread into different categories and counts and the fixation of spinning and weaving charges to be paid to the spinners and weavers. However, the rates which are fixed for the spinning and weaving in terms of different quality of wool are similar in case of all institutions. But the rates of spinning and weaving fixed by the Khadi and

Village Industry Board are relatively higher than the rates fixed by remaining institutions and societies.

Production of Woollen Products

Pankhi, Shawl, Thaan, Thulma, Carpets, Chutka, Maflar, Seat, Sweater, Tweeds, etc. are the main woollen products which are manufactured in Uttarakhand. Average charges fixed for the weaving of plain Pankhi worked out to be between Rs.15 to Rs.18, shawl Rs.85 to Rs.100, Carpet Rs.350 to Rs.400, Chutka Rs.12 to Rs.15, full Sweater Rs.20 to Rs.35 and Tweeds @ Rs.5 to Rs.8 per metre. However, the rates fixed for the weaving of different woollen products vary according to the quality of wool used in the production of particular product and the design of the product. The spinning charges fixed for the spinning of different types of wool varied between Rs.10 to Rs.25 per kg. of wool spun and are mainly determined by the counts of thread.

In Uttarakhand Khadi and Village Industry Board and Shri Gandhi Ashram are the main institutions which are engaged in the production of various woollen products. Pankhi, Shawl and Thaan are the most important woollen products which are generally produced in all the production centres of Khadi Board and Shri Gandhi Ashram. The Carpet, Thulma, Seats, Chutka and Sweater are the remaining woollen products and these are mainly being produced by the Bhotia for several

generations. At present the Anusuchit Janjati Corporation Limited is also involved in promoting the products through the introduction of various new designs and providing necessary guidelines and facilities required in the production and marketing of woollen products to the Bhotias. The Khadi and Village Industry Board and Shri Gandhi Ashram are also involved in the purchase of these woollen products from Bhotias for the purpose of sale through their own marketing outlets within Uttarakhand as well as outside Uttarakhand. However, during recent past both these institutions have also started the production of Thulma, Carpet and Sweater through the involvement of the traditional Bhotia weavers. Beside the Khadi and Village Industry Board and Shri Gandhi Ashram, there are 22 other woollen institutions and societies, comprising of 16 societies in Kumaun division and remaining 6 societies in Garhwal division which are engaged in the production of various woollen products in Uttarakhand.

The spinning and weaving of woollen yarn by respective artisans is carried out both at the production centres set up by different institutions as well as the homes of the spinners and weavers. The Village Industry and Khadi Board and Shri Gandhi Ashram have opened various distribution centres for wool and the centres for the collection of spun wool from the spinners in different locations of Uttarakhand where the woollen activities are popular and have concentrated over the last several years. The distribution

and the collection of wool is generally carried out once a week on a pre-determined day by the concerned woollen institution. The payments to the spinners engaged is carried out on the same day as per the quantum of wool spun by them. It was reported that some nominal amount of money is to be deposited with the woollen institutions by each spinner as a security against the quantity of wool which is given to each respective spinner for spinning. The security deposit amount is fixed according to the quantum of wool given to the particular spinner at a given time. This amount deposited with different woollen institutions does not cover the entire cost of wool which is distributed. Also, the required amount of security is deducted during different period of time from the payments which are to be made to the spinners for the spinning of wool. A similar practice is also adopted in case of the weaving of woollen products. However, the distribution of thread for weaving and the collection of final woollen products is carried out only at the production centres and the offices of different woollen institutions.

As far as the pattern of the production of various woollen products in Uttarakhand is concerned it is indicated that the volume of overall production is consistently increasing over the years in case of all the woollen institutions. Shri Gandhi Ashram is noted to have the highest contribution in total production of woollen products in the region. During 1991-92 the value of the production of various woollen products was Rs.172.89 lakhs which increased

to Rs.224.49 lakhs in 1992-93 and to Rs.242.09 lakhs in 1993-94. In other words, there has been an increase of 29.85 per cent in the volume of production of woollen products between 1991-92 to 1992-93 which has further increased by 7.83 per cent between 1992-93 to 1993-94. The volume of production carried out by Shri Gandhi Ashram was Rs.96.03 lakhs during 1991-92 and the same went upto Rs.136.79 lakhs in 1992-93, but it declined to Rs.130.66 lakhs during the year 1993-94. Accordingly, the contribution of Shri Gandhi Ashram in the total quantum of woollen production in the region was 72.30 per cent during 1991-92 but this share decreased to 60.93 per cent in 1992-93 and further to 53.97 per cent in 1993-94.

Table 8 : Production of Woollen Products

(Value in Rs.)

Institutions	Years		
	1991-92	1992-93	1993-94
Khadi Board	6,109,394	6,034,709	7,566,191
Shri Gandhi Ashram	9,602,836	13,679,474	13,063,673
Anusuchit Janjati Corpn. Ltd.	1,250,000	2,512,077	3,386,978
Others	326,402	222,900	189,673
All Institutions	17,288,632	22,449,160	24,208,515

The production of woollen products of Khadi and Village Industry Board was Rs.61.09 lakhs during 1991-92. The figure

decreased marginally to Rs.60.35 lakhs during 1992-93 but has further gone upto Rs.75.66 lakhs during 1993-94. On the whole the share of Khadi and Village Industry Board in the total quantum of woollen good produced in Uttarakhand worked out to be around 32 per cent during 1993-94. However, the share was as high as 35.33 per cent during 1991-92 but it was lowest at 26.88 per cent during the period 1992-93.

The Anusuchit Janjati Corporation Limited is noticed to be the only institution which has shown increasing trend in the quantum of woollen products produced during the reference periods. The volume of production of this institution has increased from Rs.12.50 lakhs in 1991-92 to Rs.25.12 lakhs in 1992-93 and Rs.33.87 lakhs in 1993-94. Consequently, the share of this institution in the total value of woollen goods produced in Uttarakhand has increased from 7.23 per cent in 1991-92 to 14.28 per cent during 1993-94.

The marginal decline in the production of woollen products is again observed in case of the Industry Department (DIC). The value of woollen products produced by DIC has declined from Rs.3.26 lakhs in 1991-92 to Rs.2.23 lakhs in 1992-93 and Rs.1.90 lakhs in 1993-94. As a result of this decline its contribution has gone down from 1.89 per cent in 1991-92 to the level of 0.80 per cent during 1993-94 in the production of woollen products in Uttarakhand.

As indicated earlier the Khadi and Village Industry Board and Shri Gandhi Ashram, which are the main institutions

engaged in the woollen activities in Uttarakhand, have established various wool production and marketing centres in the region. The main production centres of Khadi and Village Industry Board are located in Sri Nagar and Chamba in Garhwal division and Almora in Kumaun division. Beside these main centres, there are several sub-production centres in both the divisions. In Kumaun division the production of woollen goods is carried out in Almora (River View Factory), Bageshwar, Kapkote, Tarikhet, Dharchulla, Munsiairy Thal and Jaspur. The production centres of Almora, Dharchulla and Jaspur happen to be the most important centres in view of the quantum of woollen production carried out by them. However, it is observed that over the years the quantum of woollen production is consistently decreasing in most of the production centres except in the case of Dharchulla centre. However, the share of Dharchulla and Almora production centres is still relatively higher as compared to remaining production centres as far as the value of woollen production is concerned. During 1993-94, the production of Almora and Dharchulla was registered to be Rs.3.47 lakhs and Rs.7.35 lakhs respectively. The corresponding figure for Jaspur centre was Rs.5.01 lakhs. Over and above, the highest level of increase in the production of woollen products was observed in the case of Munsiairy (three folds), followed by Kapkote (170 per cent) and Dharchulla (132 per cent) production centre between the periods 1991-92 and 1993-94. Very low level of production is witnessed in Tarikhet centre

(Rs.93 thousands in 1991-92 and R.1.27 lakhs in 1993-94) as compared to remaining production centres of Khadi Board.

Table 9 : Production of Woollen Products in the Production Centres of Khadi and Village Industry Board

(Rs.in lakhs)

Production Centre	1991-92	1992-93	1993-94
Almora	40.43	43.52	42.31
Srinagar	13.55	17.47	23.30
Chamba	7.12	9.36	10.05
Total	61.10	60.35	75.66

A further probe at the pattern of production of woollen products in three main production centres, i.e. Almora, Chamba and Srinagar, reveals the fact that the Almora production centre alone produced over 55 per cent of the total woollen production carried out by Khadi Board in Uttarakhand during 1993-94. But the volume of production of Almora centre has marginally declined from Rs.43.52 lakhs in 1992-93 to Rs.42.31 lakhs during the year 1993-94. However, the volume of production in Sri Nagar production centre, which is ranked second in terms of the volume of production among the various production centres of Khadi Board, has increased from Rs.13.55 lakhs in 1991-92 to R.17.47 lakhs in 1992-93 and Rs.23.30 lakhs during 1993-94. Similarly, an increasing trend in production is also revealed in case of

Chamba production centre. However, among all the production centres of Khadi and Village Industry Board the lowest volume of production (Rs.10.05 lakhs) is recorded in the Chamba production centre during 1993-94, though it has increased from Rs.7.12 lakhs in 1991-92 to Rs.9.36 lakhs in 1992-93.

Shri Gandhi Ashram which is a major organisation involved in the production of woollen goods in Uttarakhand has established various main and sub-centres for the production and marketing of woollen goods in different pockets of the region. The main production centres are located in Sri Nagar and Gochar in Garhwal division and Haldwani and Chanauda in Kumaun division. These main production centres, are involved in the management and control over the sub-production centres in terms of supply of raw material, production of khadi and woollen goods and the marketing of goods produced by these centres. Beside this, the objective of these main centres is also to develop woollen activities and to carry out the production of woollen goods in their respective production centres. The network of Chanauda production centre is quite large in the sense that this centre is only involved in the purchase of raw wool from Tibet, its carding, finishing, milling, etc. and to distribute wool to various production centres of Kumaun and Garhwal. However, the control over the woollen production of Gandhi Ashram in districts Almora and Pithoragarh is simultaneously carried out by its camp office at Bageshwar and the Chanauda centre. However, the woollen activities

carried out in district Nainital, mainly in the plain areas, are managed by the Haldwani production centre.

Dehradun production centre is mainly engaged in the supervision and management over the sub-production centres and the marketing of woollen and khadi products. The production of woollen goods is only carried out by the Dhampur, Nagina and Bijnor centres while the Jalalabad production centre is engaged in the production of khadi goods. Another production centre of Gandhi Ashram situated in Gochar is involved both in the production and marketing of woollen products.

Analysing the pattern of woollen products produced by different production centres of Gandhi Ashram we find the Chanauda production centre is the main centre of this organisation and has contributed over 44 per cent in the total woollen production of Gandhi Ashram during 1993-94. However, production of Chanauda centre was as high as 63.52 per cent in 1991-92 and 45.04 per cent during 1992-93. The volume of production of Chanauda has declined from Rs.65.16 lakhs in 1992-93 to Rs.57.79 lakhs in 1993-94 while the respective figures were Rs.65.11 lakhs during 1991-92. Haldwani production centre is ranked second among all centres from the view point of the volume of production. The share of Haldwani centre was 31.53 per cent of the total production of Gandhi Ashram in 1993-94. In absolute terms the woollen production was worth Rs.41.20 lakhs. The volume of production in Dehradun centre has also decreased from

Rs.31.12 lakhs during 1992-93 to Rs.21.61 lakhs during 1993-94. However, this centre has shown a marginal increase of 0.68 per cent in the woollen production between the period 1991-92 and 1992-93. The Gochar production centre is noted to be very small centre with regards to the production capacity. However, only this centre has registered an increasing trend in the production of woollen products. The volume of goods produced by this centre accounted for Rs.6.49 lakhs in 1991-92 which increased to Rs.9.36 lakhs during 1992-93 and Rs.10.05 lakhs during 1993-94. Overall woollen production of Shri Gandhi Ashram has decreased by 9.69 per cent during 1993-94 as compared to the year 1992-93. However, it had increased by 41.12 per cent between the periods 1991-92 to 1992-93.

Table 10 : Production of Woollen Products
by Shri Gandhi Ashram

(Value in Lakh Rs.)

Production Centre	1991-92	1992-93	1993-94
Haldwani	N.A.	39.03	41.20
Chanauda	65.11	65.16	57.79
Gochar	6.49	9.36	10.05
Dehradun	30.91	31.12	21.61
Total	102.51	144.67	130.65

The Anusuchit Janjati Corporation Limited whose basic objective is to promote the woollen activities in the tribal areas of Uttarakhand has established two offices, one each in Garhwal and Kumaun divisions respectively. The main office of the corporation in Garhwal division is located in Dehradun while its Kumaun office is established in Nainital. Both these offices are engaged in the arrangements and distribution of raw wool to people of the Bhotia community, in making efforts towards the development of woollen activities, development of know-how and techniques of production and marketing arrangements for the disposal of woollen products in respective divisions of Uttarakhand. The production centres are also established in those areas where Bhotias are mainly concentrated. The main production centres of the corporation in Kumaun division are in Munsiairy, Didihat, Dharchulla, Khatyari, Kapkote and Kashipur. In Garhwal division the production centres are established in Chhinka, Ghighavar, Naugaon, Purola and Dunda. Beside this the production of woollen products is also undertaken at the main production centres, Nainital and Dehradun. The spinning and weaving of wool is carried out by the Bhotias at the different production centres as well as at their respective residences. Rates and charges are fixed by the corporation for spinning and weaving which are paid to the respective artisans at the time of the collection of woollen products from them. Purchase of woollen products from the traditional Bhotia households engaged in woollen activities independently

is also carried out by the corporation. During 1993-94, the production of woollen products was reported to be Rs.27.30 lakhs in Kumaun and Rs.6.57 lakhs in Garhwal Division. Besides this the corporation had purchased woollen products worth of Rs.19.21 lakhs from the Bhotias. Accordingly, the production of woollen products which was only Rs.5.81 lakhs in 1988-89 has increased to Rs.20.53 lakhs in 1992-93 and Rs.27.30 in 1993-94 in Kumaun division. The purchase of woollen products from Bhotias has also increased from Rs.1.59 lakhs in 1988-89 to Rs.19.27 lakhs in 1991-92 and Rs.19.21 lakhs during the period 1993-94. In other words the index of production and purchase of woollen products has increased to 470 points and 1208 points respectively between the periods 1988-89 and 1993-94 in Kumaun division. Also the production of woollen products in Kumaun division has increased from Rs.4.59 lakhs in 1991-92 to Rs.6.57 lakhs during the period 1993-94.

In Garhwal division the production of woollen products carried out by Anusuchit Janjati Corporation Limited has increased from Rs.4.59 lakhs in 1992-93 to Rs.6.57 lakhs in 1993-94 showing an increase of over 43 per cent during the reference periods. The highest volume of production is found in the Chchinka centre (Rs.3.73 lakhs) followed by Naugaon (Rs.1.14 lakhs) production centre while lowest level of production is reported in main centre Dehradun (Rs.36 thousands) during 1993-94. It was noted that the volume of production of woollen products has considerably decreased in

almost all the production centres of the corporation except in the case of Chchinka between the years 1992-93 and 1993-94. The Anusuchit Janjati Corporation is mainly engaged in the production of Pankhi, Shawls and Wall hangings.

Marketing of Woollen Products

Marketing of woollen products which are produced by various institutions and individuals is undertaken both within as well as outside Uttarakhand on a retail and wholesale basis. Proper coordination is maintained among different institutions in providing guidelines and assistance in the sale of different woollen products. The woollen products produced by one institution are also being sold by other institution on the basis of exchange of goods. This practice is quite popular among the different sales centres belonging to same institution. It was also observed that the various centres of Khadi and Village Industry Board and other woollen institutions located outside Uttarakhand are purchasing woollen products from the woollen institutions of Uttarakhand for the purpose of sale from their centres. Even the woollen institutions of Uttarakhand are also purchasing various khadi, woollen and other products, which are not produced by themselves, from the same institutions located outside Uttarakhand and these are sold through their sales centres. This practice is found rather popular among the

institutions of Khadi and Village Industry Board and Shri Gandhi Ashram. The main products which are being purchased by the woollen institutions of Uttarakhand from other institutions located outside of Uttarakhand are khadi products blankets, oil, leather products, cosmetics and various decoration items. Similarly various woollen products such as Pankhi, Thulma, Carpets, Chutka, Sweater, Shawl, etc. are generally being supplied by these institutions located in Uttarakhand.

The woollen institutions are directly involved in the marketing of their woollen products both in Uttarakhand as well as outside Uttarakhand. These institutions have established various sales depots and centres in almost all the towns of Uttarakhand. The sale of woollen and khadi products is also carried out through exhibitions which are organised by the concerned institutions or any other department within the country. All the institutions have reported that they actively participate in the exhibitions regularly for the purpose of marketing, display and the publicity of their woollen products. Every year, special offer in the form of rebate and concession on the purchase of woollen products is provided by the State Government so as to promote the woollen activities in the state. The amount of rebate ranges between 20 to 40 per cent of the existing market price of the various woollen products and this rebate is commences each year from Gandhi Jayanti (October 2nd) and lasts for about four months. The rebate is applicable on the

purchase of woollen and khadi products which may be sold either on wholesale or retail basis.

A look into the pattern of the sale of woollen products of different institutions reveals that during 1993-94, all institutions together sold goods worth Rs.514.90 lakhs. However, the value of sale was slightly higher (Rs.528.62 lakhs) during 1992-93. In percentage terms the sale of woollen products in 1992-93 was 48.19 per cent higher than the corresponding figure for the period 1991-92 but it decreased by 2.73 per cent during the next year (1993-94). Further, it is pointed out that throughout the reference periods the contribution of Shri Gandhi Ashram is significantly much higher than the remaining institutions in the total volume of sale of woollen products carried out in Uttarakhand. This is despite the fact that the sale of Shri Gandhi Ashram has decreased from Rs.383.32 lakhs in 1992-93 to Rs.346.45 lakhs in 1993-94. The share of Gandhi Ashram in the total sale of all institutions was reported to be 72.51 per cent during 1992-93 which has gone down to 67.38 per cent during 1993-94. In fact the volume of sale of the woollen institutions, except in the case of Anusuchit Janjati Corporation Limited, has been consistently declining over the years. The sale of Khadi and Village Industry Board has decreased from Rs.88.70 lakhs in 1992-93 to Rs.61.59 lakhs during 1993-94. Likewise the sale of industry department (DIC) has also decreased by 33.88 per cent between the periods 1992-93 and 1993-94. But the sale of Anusuchit

Janjati Corporation Limited has increased from 53.53 lakhs in 1992-93 to Rs.94.12 lakhs during 1993-94. On the whole the volume of sale of all woollen institutions taken together, which was Rs.356.71 lakhs in 1991-92 increased by 48.19 per cent during 1992-93 and then witnessed a decline of 2.73 per cent in 1993-94.

Table 11 : Value of Sale by Institutions

(Value in Rs. Lakhs)

Institutions	1991-92	1992-93	1992-93
Khadi and Village Industries Board	67.41	88.70	61.59
Shri Gandhi Ashram	214.73	383.32	346.45
Anusuchit Janjati Corpn. Ltd.	69.58	53.53	94.12
Others	4.99	3.07	2.03
All Institutions	356.71	528.62	514.19

As indicated earlier the sale of woollen production is undertaken on bulk as well as retail basis. However, this kind of practice is found mainly adopted by Shri Gandhi Ashram during the reference periods. During the year 1993-94, the sale undertaken on bulk accounted for Rs.89.44 lakhs as against Rs.106.05 lakhs in 1992-93. Thus a major proportion of woollen products manufactured by different institutions was sold on retail basis in 1993-94 (88.66 per cent) as well as in 1992-93 (79.93 per cent). Even the sale

of woollen products carried out by Shri Gandhi Ashram in bulk has declined from Rs.106.05 lakhs in 1992-93 to Rs.89.44 lakhs in 1993-94. It was reported by Shri Gandhi Ashram that marketing of woollen products on wholesale basis is carried out only with the other sales centres of Gandhi Ashram which are mainly located outside Uttarakhand. In fact, it was reported that some times similar kinds of marketing practices are adopted with various centres of Gandhi Ashram in Uttarakhand itself. Further, it is pointed out that the various institutions are also purchasing woollen products from the individual households which are traditionally

Table 12 : Value of Retail and Wholesale Sale

(Value in Lakh Rs.)

Institutions	1991-92		1992-93		1993-94	
	Whole-sale	Retail	Whole-sale	Retail	Whole-sale	Retail
Khadi & Village Industries Board	-	67.41	-	88.70	-	61.59
Shri Gandhi Ashram	67.48	147.25	106.05	277.27	89.44	257.01
Anusuchit Janjati Corpn. Limited	-	69.58	-	53.53	-	94.12
Others	-	4.99	-	3.07		2.03
All Industries	67.48	289.23	106.05	422.57	89.44	414.75

engaged in the woollen activities in Uttarakhand. However, the Anusuchit Janjati Corporation Limited is buying woollen

products from Bhotia artisans only. The woollen products which are being purchased from individual artisan households include, Thulma, Carpet, seats, decoration items, etc.

It has been observed that the volume of production as well as sale of woollen products has decreased in Uttarakhand over time. This kind of situation was found emerging in case of most of the woollen institutions in general and the Khadi Board and Shri Gandhi Ashram in particular. An analysis into the pattern of sale of woollen products of various sales centres of Khadi and Village Industry Board revealed the fact that the sale of woollen products carried out in the various sales depots of Almora production centres has decreased from Rs.68.51 lakhs in 1992-93 to Rs.34.58 lakhs during 1993-94 while the corresponding figure of sale for this centre was Rs.51.88 lakhs in 1991-92. But it has to be kept in consideration that the highest amount of sale is registered by the Almora centre from among all the centres of the Khadi and Village Industry Board in Uttarakhand. During 1993-94, the share of Almora centre in the total sale of Khadi Board was over 56 per cent. In fact it was as high as 76.96 per cent in 1991-92 and 77.34 per cent in 1992-93. Despite the fact that the sale of Almora centre has declined to 49.52 per cent between the periods 1992-93 and 1993-94. The Almora centre continues to be the most important centre from the point of view of sales.

The volume of sale of woollen products of remaining two centres, Chamba and Sri Nagar, of Khadi Board is consistently

increasing over the years. The sale of Sri Nagar Centre, which is second most important centre from the view point of the volume of production and sale, during 1992-93 was Rs.12.59 lakhs and this has increased to Rs.15.19 lakhs during 1993-94. Likewise, the volume of sale carried out from Chamba centre has increased from Rs.7.61 lakhs in 1992-93 to Rs.11.82 lakhs during the period 1993-94 though during 1992-93 the sale of this centre had decreased by 12.54 per cent as compared to the year 1991-92. In all during 1993-94 the contribution of Srinagar and Chamba centre in the total sale of Khadi and Village Industry Board registered figures of 24.66 per cent and 19.19 per cent respectively.

Table 13 : Sale of Different Centres of Khadi Board

(Value in Rs.)

Centre	1991-92	1992-93	1993-94
Chamba	869156	760193	1181622
Srinagar	684000	1258859	1518929
Almora	5188000	6851000	3458000
All Centres	6741156	8870052	6158551

The marketing of woollen products by Shri Gandhi Ashram is carried out primarily from its four main sales depots located at Haldwani, Chanauda, Gochar and Dehradun besides the several smaller sales centres and shops established in Uttarakhand and outside Uttarakhand. The Chanauda centre is

the largest production as well as sales centre among the existing centres of Shri Gandhi Ashram in Uttarakhand. The Haldwani and Dehradun centres are respectively second and third in ranking while the Gochar centre is at the bottom both in terms of the volume of production and sale of woollen products. The contribution of Chanauda centre is reported to be as high as 39.88 per cent followed by 34.52 per cent for Haldwani, 18.59 per cent for Dehradun and only 7.02 per cent for Gochar production centre in the total volume of sale of Shri Gandhi Ashram. However, the sale of woollen products of all the centres has been declining over time. The volume of sale of Chanauda centre has declined from Rs.163.51 lakhs in 1992-93 to Rs.138.16 lakhs in 1993-94 but it had increased by over 13 per cent in the year 1992-93 as compared to 1991-92. Similarly the sale of Haldwani centre has decreased from Rs.124.92 lakhs in 1992-93 to Rs.1119.58 lakhs in 1993-94 while the figures of production of Dehradun and Gochar centres have decreased by 7.54 per cent and 3.65 per cent respectively during the same periods of time.

As indicated in the preceeding analysis the Anusuchit Janjati Corporation Limited, which is engaged in the task of assisting Bhotias in the promotion of woollen activities, is also actively engaged in the supply of various types of raw materials required as well as in the marketing of woollen products in Uttarakhand. The purchase of woollen products from Bhotias is carried out by various centres of the corporation. The corporation also provides necessary

guidelines to the Bhotias in terms of the marketing of various products, if they are interested to sale woollen products independently. Training programmes are also instituted by the corporation for the upgradation of the quality of products.

Table 14 : Sale of Different Centres of Shri Gandhi Ashram

(Value in Rs.)

Centres	1991-92	1992-93	1993-94
Haldwani	-	12492303	11958332
Chanauda	14453002	16351234	13815596
Gochar	-	2523103	2431387
Dehradun	7020426	6965079	6440082
All Centres	21473428	38331719	34645397

The sale of woollen products carried out by the Corporation is consistently increasing over the years. The total sale of Kumaun Anusuchit Janjati Corporation which was Rs.8.92 lakhs during 1988-89 has gone upto Rs.15.98 lakhs in 1990-91 and Rs.42.50 lakhs during 1993-94. Similarly the sale of Garhwal Janjati Corporation Limited has increased from Rs.34.52 lakhs in 1991-92 to Rs.51.62 lakhs in 1993-94 showing an increase of around 50 per cent during same period of time.

CHAPTER IV

INITIATIVES FOR THE DEVELOPMENT

In the preceding chapters a review and analysis regarding the procurement of raw materials from different sources, pattern of production and marketing of various woollen products has been presented. Besides this, the supply and demand conditions of different locally available and imported varieties of wool in response to various woollen institutions existing in Uttarakhand has also been systematically analysed. In this chapter, we propose to highlight the various strategies and development programmes undertaken for the promotion of woollen activities in Uttarakhand over the years. Attention is also devoted to examine the outcome and the result of the initiatives undertaken by different departments and agencies for the development of wool and wool related activities.

Development of Sheep Breeding and Woollen Activities

The woollen activity happens to be quite old in Uttarakhand and is adopted as traditional household activities by the Bhotia people in various parts of

Uttarakhand. Later on during British rule in India the woollen activities were recognised to be an important activity in view of the generation of employment and income avenues in the perspective of the tribal community which was engaged in them for the past several generations. Thus the strategy towards the development of woollen activities in Uttarakhand started from the late period of British rule in India. Thereafter, the Industry Department had made a comprehensive development plan for wool. Later a need was felt to establish an independent Board for implementing the suggested development approach in favour of woollen activities. The woollen activities started developing with the establishment of Khadi and Village Industry Board by the Industry Department of State Government and an autonomous organization on the name of Shri Gandhi Ashram. Various production centres were established by these two institutions in different pockets of Uttarakhand in general and areas where woollen activities were mainly concentrated for past several generations. With their initiatives several other than Bhotia community people have also started the spinning and weaving of wool in Uttarakhand.

Efforts in the production of wool according to the demand of various woollen institutions and individuals have also been carried out through the introduction of various wool development programmes. The Animal Husbandry Department is intensively engaged in the development of better quality

of wool through the improvement in the breeds of sheep. The first initiative to improve the breed of sheep was carried out in 1939 at Bhalwari and Purola blocks of Uttarakashi. However, greater efforts to improve the breeds of sheep and wool production was initiated with the establishment of wool research and analysis centres by Animal Husbandry Department at Pashuloke in 1951.

Department of Animal Husbandry is running 13 sheep farms in Chamoli, Uttarakashi, Tehri, Almora, Pithoragarh and Dehradun districts. Under the cross breed programme the rams and ewes of border liecester, corriedals and polwarth were supplied by FAO. Now Russian Marino sheep are being imported since 1973-74 so as to develop marino wool in Uttarakhand. During 1976, an Intensive Sheep Development Programme had been introduced for the purpose giving greater thrust for the development of sheep and wool. At present various farms of Animal Husbandry Department are maintaining pure rambulate, pure Russian Marino and cross breed sheep. From these farms nearly 800 number of Rams are distributed every year to the breeders for their cross breeding programme of the above non-descript sheep. It is estimated that there is a need of two thousand rams per year for the above mentioned sheep breeding programme. Thus the gap of 1200 rams needs to be filled up.

It was reported by the Animal Husbandry Department that in order to achieve this target strengthening of the various sheep farms is to be taken up. For strengthening of the sheep farm the state of U.P. has got limited financial

resources. So the Central Government has been requested to give additional funds so that the sheep farms may be strengthened and better quality of animals may be produced. By strengthening of the farms the breeding efficiency of the animals will increase and increased number of rams will be available for breeding.

Before, the initiation of Intensive Sheep Development Programme, the non-descript, Rampur Busayar and local indigenous breed of sheep were available in Uttarakhand. The breed distribution was 62 per cent non-descript, 21 per cent local indigenous, 30 per cent graded and 14 per cent Rampur Busayar with a body weight of 28 kgs. and wool production per sheep averaged around 600 gms. only. The improvements in the body weight and wool production took place during 1977-88 when the body weight and the production per sheep increased to 36 kgs. and 1.103 kgs. respectively. Previously wool available from sheep was coarse with a staple length of approximately 7 cms. while for graded wool the length of staple was between 12 to 16 cms. Again significant levels of improvement were achieved during 1980-81 when it reached to the level of 53 per cent. It was stated by the Animal Husbandry Department that at present they have obtained the level of 70 per cent in breed improvement with fine and medium fine quality of apparel wool with production of 1.53 kgs. and body weight around 40 kgs. The ultimate aim of Animal Husbandry Department is to convert all the local

sheep into Rambulate and Russian Marino according to their adaptability.

Efforts are also being made to initiate pasture development programme at selected sheep breeding farms in a big way, so that various farms may be self-sufficient to meet the demands of their feed and fodder. During 1992-93 the Government sanctioned development of 675 acres of land on different farms.

Further, for the purpose of increasing wool production and to encourage people engaged in sheep rearing and the production of woollen products sheep 'melas' are to be organised at district and divisional levels. It is planned that seminars and competitions shows to be organized for sheep rearing and sheep breeds. Beside this, the best sheep breeder be given a prize of Rs.5000 with an award title of sheep pramukh. For the purpose of the sheep and wool development in Uttarakhand Rs.257.56 lakhs consisting Rs.136.56 lakhs under non-plan and Rs.121.00 lakhs plan head was sanctioned by the state government during 1990-91. During 1992-93 the amount sanctioned for above purposes increased to Rs.164.70 lakhs under non-plan head and Rs.320.07 lakhs under plan head. On the whole plan and non-plan expenditure together on the development of sheep breeding and woollen activities has increased by 88.22 per cent during the periods 1990-91 and 1992-93.

Accordingly, a programme has been introduced in terms of the supply of raw wool to different woollen institutions located in Uttarakhand according to their requirements. For this purpose a Wool Bank has been established in Almora by the State Government which is receiving regular financial assistance for the purchase of different types of wool and its distribution to various institutions and individuals engaged in the woollen activities. Regarding the processing of raw wool the facility is provided by Khadi Board and Shri Gandhi Ashram in both the divisions of Uttarakhand. The first carding, finishing, milling, dyeing and washing plant was installed by Shri Gandhi Ashram at Chanuada production centre in 1950. At present there are 6 carding plants, two established by Shri Gandhi Ashram one each at Bageshwar and Chanuada and four established by Khadi and Village Industry Board one each at Shrinagar, Chamba, Almora and Munsiahy respectively. The facility of carding and processing of wool by the plants of both these institutions is readily available to all institutions and individuals in Uttarakhand.

The Uttar Pradesh State Handloom Corporation Limited has also come forward to develop woollen activities in Garhwal and Kumaun regions since 1985-86. The Handloom Corporation has introduced various training programmes related to the development of designs, weaving of shawls, carpets, etc. in various pockets of Uttarakhand in order to promote woollen activities. During the initial period of the introduction of woollen development programme in 1985-86 the Corporation was

sanctioned Rs.44.13 lakhs financial assistance for the purpose of the marketing and publicity of woollen products, administrative expenditures and the distribution of karghas among the weavers. This amount increased to as high as Rs.331.67 lakhs during 1991-92 but it decreased to Rs.47.56 lakhs in the year 1993-94. It was stated that the Corporation has established various production centres, design centres and process houses/small dye houses in both the divisions of Uttarakhand. Monitoring of these various centres is also carried out from time to time.

Technological Development

Various institutions which are engaged in woollen activities and the state government have introduced several development programmes in the field of the production techniques of woollen products during the past.

As was stated earlier, the technology used in the production of woollen products, particularly in the process of spinning and weaving of wool, was basically traditional as was adopted by Bhotias several generations ago. Later the Bageshwary Charkha as a means of spinning was introduced during mid-thirties. Similarly, the weaving of woollen products was mainly performed by Pithi Chan and other local technological devices. In fact, in remote areas the weaving of woollen products such as pankhi, shawls, tweeds, etc. was

developed later on during 1935-38, when the Bageshwary Charkha was introduced in Uttarakhand. At present the weaving of woollen products is mainly performed by ranch.

In terms of the spinning of wool the traditional method of spinning of wool by locally manufactured Takly has almost changed. This method was first substituted by the introduction of Bageshwary Charkha and later on by the New Model Charkha. In fact the use of Bageshwary Charkha has also declined considerably after the introduction of New Model Charkha. The New Model Charkha was introduced sometimes during 1975-80 in Uttarakhand by the Khadi and Village Industry Board. Thus, the spinning of wool in Uttarakhand is carried out mostly by New Model Charkha while the Ranch is used for the weaving of woollen products.

At present various woollen organizations such as Khadi and Village Industry Board, Shri Gandhi Ashram, Industry Department, Anusuchit Janjati Corporation Limited are seriously engaged in organizing and providing training programmes for the spinning and weaving of woollen yarn in the region. The training is being imparted in spinning wool on the New Model Charkha at different production centres of these organizations. Special funds have also been provided by the state government in favour of establishment of training centres and for meeting the expenditures involved on different heads of the implementation, evaluation, purchase of raw materials and equipments, scholarship of trainees, etc.

The state government is giving special consideration for the development of spinning and weaving activities in Uttarakhand. Development of woollen activities is thought to be an important instrument in favour of the creation of additional employment and as a source for providing income on regular basis to the people living below the poverty line. In the plan approach of Integrated Rural Development Programme of State Government is providing training for spinning and weaving of wool to rural youths and other unemployed on a regular basis. This programme is initiated in the perspective of providing self-employment opportunities through imparting training in the field of spinning and weaving. The training for spinning is provided to eligible people from rural areas for the periods ranging between one month to three months while for weaving the training period ranging between three months to six months.

The training of spinning and weaving is being provided every year in different training and production centres of various woollen institutions covering almost all the districts of Uttarakhand. Special emphasis is also laid on bringing more and more women in these training programmes so as to improve their socio-economic status. During 1992-93 the training programmes of spinning for women was organized in Uttarakashi, Chamoli, Pithoragarh, Nainital and Dehradun districts. In each district, ten training centres for spinning of wool for women were established. The state government has released Rs.23.95 lakhs for this purpose.

However, the provision of expenditure to be incurred in the training programme was Rs.47.356 lakhs of which the share of Khadi and Village Industry Board was Rs.16.386 lakhs and remaining amount was to be contributed by the state government.

A look at the break-up of expenditure on different heads carried out in the implementation of spinning and weaving training during 1992-93 revealed that a major amount was spent in the purchase of New Model Charkha, Ranch and other equipments and machinery (9.53 lakhs) followed by distribution to spinners and weaving trainees as scholarship (Rs.5.25 lakhs) and remaining amount was spent on workshops, etc.

Further, it was proposed to establish 40 training centres for spinning and weaving activities in different districts of Uttarakhand by various woollen institutions during 1993-94. In this programme 800 spinners and 100 weavers were to be trained. It was informed that till now 39 centres for spinning and weaving have been established and around 780 people have been provided the training of spinning and the number of beneficiary under weaving training programme are about 580. Besides this, 250 unemployed youths have been provided self-employment opportunities in wool and wooll related activities during the reference period.

It was stated by various institutions which are involved in providing training for spinning and weaving that the wool

is distributed among the training centres as per their requirement for spinning and weaving at the respective training centre. Also prescribed charges for spinning and weaving are given to each trainees besides the scholarship provided to them during the period of training. However, some amount is deducted from the spinning and weaving charges which are paid to the training. This amount is finally adjusted with the cost of machinery and equipments which are given to each trainee after the successfully completion of training programme. It has to be mentioned here that the trainees are provided required machinery and equipments for spinning and weaving on the basis of 75 per cent subsidy from state government. The remaining 25 per cent cost of machinery and equipments is adjusted from the amount which is already deducted by the concerned woollen institution from the spinning and weaving charges paid to the trainees during the period of training.

It was estimated that during 1993-94, the trainees have utilized 4564.559 kgs wool for spinning during the training period. In value terms the cost of spun wool was estimated to be Rs.10.11 lakhs. The spinners were provided Rs.10.49 lakhs as spinning charges. Besides this, 780 beneficiaries were given New Model Charkha after the successful completion of the spinning training. These New Model Charkhas were purchased through Khadi and Village Industry Commission and distributed among the beneficiaries on the basis of 75 per cent subsidy on the total cost of the Charkha. The remaining

amount of 25 per cent cost was adjusted from the deductions made from the spinning charges which are paid to beneficiaries during the period of their training.

Thus the basic objective of the introduction of training programme for spinning in Uttarakhand aims at providing employment opportunities among those rural masses who are living below the poverty line. Specific number of rural youths are provided training for spinning and weaving. Thereafter the facility for regular supply of wool for spinning to the beneficiaries is provided after the completion of the training. The option is open for the beneficiaries in terms of carrying out the spinning and weaving activities either at the training centre or at their respective homes. The beneficiaries were found working at the training centre in a workshed. However, a majority of the beneficiaries carry all the required machinery and equipment at their respective houses so that the concerned activity may be performed whenever the time is suitably available to them.

As far as the impact of the introduction of the training programmes for spinning and weaving activities in different districts of Uttarakhand is concerned it was observed that in the high altitude and remote areas of Uttarakhand the programme has been successfully implemented. People having little or no assets for income generation including the people who are landless or have very small land holding size

are participating in these training programmes. The participation of people in the training in most of the valley areas except in Gochar was found to be very poor. However, in Gochar the training of spinning provided by Shri Gandhi Ashram during last years was well attended by both male and female groups of population. It was seen that women from neighbouring areas of Gochar are regularly attending and approaching the production centre of Gandhi Ashram for the spinning of wool after they have successfully completed the training of spinning for about three months.

It was noted that in the training of spinning which was organized by different woollen institutions the participation of women was considerably higher as compared to men. However, the domination of men was recorded much higher in the training programmes organized for weaving activity. In general, the spinning activity is dominated by womenfolk while the women can be hardly seen weaving. But the women are involved in providing the finishing touch to the final woollen products, knitting of sweaters, weaving of carpets through traditional methods of technology, and assisting weavers in other activities involved in the production process of woollen products.

Further, enquiring about the participation of people in the various training programmes of spinning and weaving as experienced by different institutions, it was reported that at the initial stages of the introduction of the training programme people show very keen interest in the enrolment for

training programmes. In fact, sometimes the selection of beneficiaries from among such a large number of willing people to be enrolled for the training programmes becomes a difficult task. Besides this, during the initial stages of training the beneficiaries take considerable interest in learning and perform well. But once the training commences the interest of a sizeable number of trainees start decreasing. It was also observed that a sizeable proportion of people participate in training programmes just to avail the facility of scholarship which is provided by the concerned training institutions during the period of training and the New Model Charkha is given after the completion of training. There were a number of cases where the New Model Charkha which were given to beneficiaries on the basis of subsidy were not being utilized for the spinning of wool. Some of the beneficiaries have even sold these machines to other spinners at very low prices. A study undertaken by Khadi and Village Industry Commission during 1994 also found that among the NMC distributed to the beneficiaries after the completion of training only of 25 to 40 per cent of them were in operation. A majority of the spinners have reported that they are unable to get wool for spinning on regular basis.

However, a larger segment of trainees are successfully carrying spinning and weaving activities either at their houses or at the workshop of different production centres of the woollen institutions. The women were seen coming to the production centres regularly. Even few women spinners were

seen usually bringing their little children with them at the workshed. At these production centres the wool is distributed among the spinners as per their requirement. The spun wool is collected from the spinners on the same day by the concerned institution. The charges for spinning are paid to the spinners as per their requirement or on the same day, depending upon the mutual understanding of both spinners and the woollen institutions.

CHAPTER V

PROBLEMS, POTENTIALS AND THE SUGGESTIONS OF THE DEVELOPMENT

An overview of the functioning of wool and wool related activities in different areas of Uttarakhand revealed the fact that these activities are quite old and have been operating at household level as traditional household activities. It was the period of British rule in India when the woollen activities in general and spinning and weaving of woollen yarn in particular started developing with the initiatives undertaken by the Industry Department to promote their development. Later on several non-governmental organizations and individuals came forward to get involved in the process of the development of wool and wool related activities in the region. At the same time due to increase of population at an unprecedented rate and the addition of labourforce on one hand and the increasing problem of employment and the avenues of incomes on regular basis on the other hand had widened the participation rate of population in woollen activities during the recent past. It was also observed that the amount of earnings available from the woollen activities have increased significantly ~~level~~ as a result of the introduction of the improved means of production techniques. As a consequence of measures

underlined above the woollen activities have gained a lot over the years.

At present, the woollen activities have been quite popular in almost all the areas of Uttarakhand. The participation of both male and female segment of population is considerably increasing. In fact, in border areas of Uttarakhand the woollen activities are the main source of livelihood of a majority of the households.

However, it has been well realized that the development of woollen activities in the region is taking place much below the level of expectations. Several factors have been reported behind the unsatisfactory progress of these activities by various institutions which are engaged in woollen work in Uttarakhand. The basic problem highlighted is regarding the availability of different types of wool timely and in adequate quantity. The wool which is available from Tibet and Nepal was banned after the Indo-China dispute in 1962 but the supply has been resumed for last three years or so. But the woollen products manufactured from Tibbetian wool have lost its market in the region. The consumers are preferring to buy mill made woollen products and the products which are manufactured by soft wool such as Australian/marino and Rambute wool. It was reported by various woollen institutions that due to these problems the Tibbetian and Belchi wool is heavily dumped unsold at Dharchulla. The traders are visiting to different woollen institutions for

the purpose of the sale of these types of wool but the demand is limited due to above mentioned factors.

The demand of Tibbetian and Belechi wool has also declined as a result of the changes in the technological means of production during recent past. The Tibbetian and Belchi carded wool contains small spirts which is rather difficult to spin on New Model Charkha. The traditional means of production Takli, and to some extent Bageshwari Charkha, were noted to be the most suitable means of spinning for Tibbetian and Belchi wool. But these means have been neglected by the spinners. Because the spinning of wool by Takli and Bageshwari Charkha is less productive and provide lower levels of earnings as compared to the much more efficient means of production, i.e. the New Model Charkha.

The wool having long spirts such as Australian/Marino is indicated to be used for spinning through New Model Charkha. Other types of wool may also be spun by New Model Charkha but the quality of thread which is spun by this means is reported to be quite inferior in terms of the counts of the thread. Unfortunately, the supply of Australian/Marino wool in Uttarakhand is limited to a certain extent. The Australian/Marino wool is imported from Australia by various woollen agencies. However, in Uttarakhand no such agency or organization is involved in the import of Australian wool.

The demand of Australian wool of different woollen institutions is met through a number of unsystematic means.

The production centres of Khadi and Village Industry Board are bound to follow the rules and directions provided by their head office located at Lucknow. The Khadi and Village Industry Commission is involved in the supply of required quantity of wool to the Khadi Board. It was indicated that all the production centres of Khadi Board located in Uttarakhand firstly estimate the expected demand of wool to be used by various production centres. This proposal is sent to the head office of Khadi and Village Industry Board for final approval. Then the wool is purchased from Woollmen India Limited, Thane through Khadi and Village Industry Commission.

It was reported by the various production centres of Khadi Board located in Uttarakhand that the wool supplied by head office is much below the level of their requirements. Even the wool is hardly available when it is required. As a result of this the wool cannot be distributed to spinners on a periodic basis and so the spinners remain without any work and have to face the condition of serious unemployment.

The Gandhi Ashram and other woollen institutions are purely dependent on the supply of Australian/Marino wool from private traders and the wool federations of other states. The wool is not available in adequate quantity and this seriously affects the production capacity of various production centres of different woollen institutions adversely.

At present the Australian/Marino wool is being obtained from the wool traders of Punjab, Himachal Pradesh Wool

Federation, Jammu and Kashmir and Wool Federation of Rajasthan. The cost of transport involved in the procurement of wool from different sources is borne by the woollen institutions of Uttarakhand. So, ultimately the cost of wool products manufactured by these institutions remains significantly at higher than the similar kinds of products manufactured by the woollen institutions of other states particularly of the states from where wool is obtained. The ultimate result is that the woollen products manufactured in Uttarakhand have lesser marketing potential outside the region due to their higher prices.

In view of the several problems existing in the supply of wool in Uttarakhand, the woollen institutions had suggested the establishment of a wool federation on the pattern similar to that of various other states. In fact, the wool bank is established by the Khadi and Village Industry Board in Almora. But the wool Bank is mainly involved in the procurement and distribution of Tibetan and Belchi wool. Also the working capital sanctioned to the Bank for the purchase of wool is much less than the requirement of wool to be purchased in accordance to the demand of existing woollen institutions in the region. In case of the inability on the part of the Government for the establishment of wool federation in Uttarakhand the Wool Bank may be strengthened by way of providing adequate amounts of financial assistance so that it may be possible for the wool bank to procure Australian/Marino wool as per the requirement of various

woollen institutions. At the same time, considering the geographical and transportation problems which exist in different locations of Uttarakhand some small stores of wool may be established in different areas where woollen activities are well developed and are mainly concentrated so that the required quantity of wool be made available to different institutions and individuals at proper time. It will also help in minimising the cost of transportation of various institutions. The woollen institutions have also recommended in favour of the introduction of transport subsidy on the purchase of raw wool and the marketing of woollen products both within and outside Uttarakhand.

Another problem is found in terms of the acceptability of the recently developed means of spinning of wool by general masses in Uttarakhand. As was indicated earlier the production capacity of recently introduced New Model Charkha as a means of spinning is significantly much higher than the traditional means of production as well as other instruments which were used in the spinning of wool. The cost of New Model Charkha is much higher and the poor economic conditions of a majority of the spinners do not allow them to acquire this means of spinning technology. It is, therefore, suggested to minimise the cost of New Model Charkha by way of providing subsidy on its prices and suitable measures be undertaken to make them available to general masses in the market. With the increase of the supply of New Model Charkha in open market, the increased supply of Australian type

better quality would be an additional measure to be taken up in the development of woollen activities in Uttarakhand. The workshop at micro-level in different areas where woollen activities are mainly concentrated may be established by various woollen institutions which can boost the productivity at certain level.

The woollen institutions and the officials of the Government departments which are involved in woollen activities should have to play an active role in the distribution of wool for spinning to the artisan in adequate quantity and the collection of processed wool and woollen products from them. Certain measures should also be taken by woollen institutions in providing required assistances and guidelines, particularly in regard to the repair of spinning and weaving machines, making awareness about the adoption of know-how technology, and the solution of certain other problems those are existing in successfully performing of the woollen activities.

It was reported by the spinners and weavers that they do not receive the charges of spinning and weaving of woollen products immediately after the completion of work allotted to them from certain woollen institutions, particularly if the work is done for Khadi and Village Industry Board. This kind of unsystematic payment practices adopted by the woollen institutions on one hand and the supply of wool in inadequate quantity on the other hand have decreased the productive

efficiency of the spinners. Considering into account the poor economic conditions of the labourforce engaged in the woollen activities the payments against the work performed by them should be made on regular basis. Otherwise the artisans are forced to get engaged in other economic activities to earn their livelihood.

As indicated in the earlier chapter, various woollen institutions are currently engaged in providing training for spinning and weaving activities to the youths and unemployed persons under the Deen Dayal Vojana. Special emphasis is being given to include more and more women in these training programmes. However, it was noted that the timing fixed for providing training facilities to women are not suitable to them. Because women have to perform several household activities particularly at the morning and evening time. It seems rather difficult for them to participate in training programmes regularly for eight to ten hours in a day. Therefore, it is proposed to systematise the training hours as suited to women trainees so that participation of women may be maximised. Also, per day average hours fixed for the training may be reduced and the training period may be increased accordingly.

Identification of beneficiaries which are to be included in the training programmes for spinning and weaving activities should be carried out keeping in view the socio-economic conditions of the concerned individuals to check his willingness and interest in learning and the adaptation of

respective activity. As was revealed that a sizeable number of individuals generally enrolled themselves in the training programme just to avail the facility of scholarship provided during the training programmes and to get the benefit of the subsidy and other financial assistance which is provided for the purchase of machinery and equipments for spinning and weaving after the completion of training programme.

It is further suggested to provide training facility only to those individuals who were not engaged in woollen activities previously either directly or indirectly. It may also be suggested that the provision of providing training facilities for spinning and weaving activity to unemployed youths should not be taken up as a target oriented programme. The observations are that the identification of the beneficiaries for training programme of woollen activities is not carried out systematically and in proper way. It was reported in various areas that those individuals who were already engaged in woollen activities in general and weaving activity in particular were included in the training programmes in large numbers. It was basically due to the fact that the emphasis of launching training programmes was mainly in such areas and locations where the woollen activities were more concentrated. With the non-availability of the real beneficiaries for the training programme, the target of the number of individuals to be provided training facility was filled among the individuals belonging to spinning and weaving households in the particular locations.

It is, therefore, suggested to carry out strictness in the identification of beneficiaries among the really unemployed youths and those who are not engaged in woollen activities. Decentralisation and the diversification in providing training programme in different locations of the region will be an additional measure for the development of woollen activities in Uttarakhand.

A need is also felt to investigate further regarding the improved technology which may be suitably used for weaving of the woollen products. The means of technology which is currently adopted by the weavers in the production of woollen products is very old. The machines and other equipments are mainly available within Uttarakhand and are manufactured by local carpenters. However, some equipments are purchased from outside Uttarakhand. It was suggested by different woollen institutions that the powerloom type of technology could be developed in place of the present technology. In fact, regarding the increase of productive capacity in the spinning of wool the New Model Charkha could be operationalised through connecting it with the power.

The marketing of woollen products is carried out by different woollen institutions both within and outside Uttarakhand. In Uttarakhand these institutions have established various sales centres and shops in almost all the district headquarters and in small towns. The sale of woollen products is also carried out in the exhibitions

which are organised by different departments and organizations throughout the country. The provision of special rebate on the purchase of different woollen products is also introduced by the State Government for certain period of time so that the woollen activities could be developed to a certain extent.

However, various kind of problems are still existing in the sale of woollen products. These problems are generally experienced in terms of the market competitions emerging due to changes in the taste and choice of consumers regarding the purchase of different woollen products during the recent past. It was observed that the choice of consumers has diverted towards the purchase of better quality products now available at lower prices. The woollen products which are manufactured by large woollen mills are noted to be mostly preferred by the consumers due to the fact that the quality of different woollen products manufactured by larger woollen mills is superior than the similar types of products manufactured by local weavers and different woollen institutions. Also the prices fixed for different woollen products of the mill made products are reported to be comparatively lower as those charged by different small woollen institutions.

Due to non-availability of imported and better quality wool at reasonable distances from the spinning and weaving centres and problems existing in the transportation of raw materials and final woollen products from one geographical

location to other, are also adding much to the cost of woollen products which are manufactured in different location of Uttarakhand. At the same time, due to differences existing in the problems of transportation among different woollen products manufacturing areas the price differences are existing at significant levels among the similar types of woollen products manufactured by different woollen institutions and individuals.

Thus a concerted effort should be undertaken to improve the cost effectiveness of the woollen products, to a certain extent which are manufactured in different locations. This problem may be effectively solved by way of the introduction of transport subsidy on the purchase of raw materials and the marketing of woollen products both within and outside Uttarakhand. At the same time proper arrangement may be carried out for the regular supply of raw wool in adequate quantity through the establishment of a well equipped wool federation in Uttarakhand.

Improvements in the marketing of woollen products could be done through the establishment of collection centres of woollen products atleast one each in Garhwal and Kumaun divisions. Efforts may also be carried out in terms of increasing the publicity of woollen products, frequently organisation of exhibitions and to make special provision for the participation of different woollen institutions in these exhibitions.

It is observed that there have been negative improvements in the designs, used in the production of different woollen products for past several generations. This was particularly seen in the designs used in the production of carpets, shawls, wall hangings and chutka. Efforts have been made to develop new designs and models of woollen products by various woollen institutions and handloom corporation during past but the improved designs have not yet reached the main artisan communities who are involved in the production of these products for past several generation at household level. The training programmes for the introduction of new designs should be diversified greatly in different areas of Uttarakhand in particular and the areas where the woollen activities are mainly concentrated. A provision of providing scholarship atleast at the level to meet the opportunity cost of the trainees artisans should also be introduced so that increasing number of artisans may be included in the proposed training programme. Introduction of varied types of designs in the woollen products will widen the marketing potentials of goods at certain extent.

Lastly it is to be suggested that the proper attention should be devoted towards the development and expansion of grazing land. It is noted that the grazing land for sheep is decreasing consistently over the years due to the decrease of forest land area. Improved variety of grass and plants may be grown in the available pasture and fallow land areas of Uttarakhand so that the population of sheep may be increased to a certain extent.